Advanced Planning

Guide to Setup and Processing

INFINIUM SOFTWARE

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About This Guide

This section focuses on the following information:

- Purpose of this guide
- Conventions used in this guide

Intended Audience

This guide is for personnel who will be responsible for the implementation, maintenance and daily activities of Infinium Advanced Planning, including project managers, production managers, material planners, team leaders, internal trainers and data entry staff.

This guide assumes you already have Infinium Cross Applications, Infinium Formula Management, Infinium Order Processing, Infinium Purchase Management, Infinium Manufacturing Control and any other applicable Infinium applications set up before following the steps and instructions contained in this guide.

Purpose of This Guide

This guide shows you how to use Infinium Advanced Planning to complete specific planning tasks and provides you with information about various Infinium Advanced Planning concepts.

Organization of This Guide

This guide is divided into parts. Each part contains overview and detail information. Appendices in this guide contain additional reference information.

Conventions Used in This Guide

This section describes the following conventions we use in this guide:

- Fonts and wording

- Function keys
- Character-based vs. graphical interface
- Prompt and selection screens
- Promptable fields
- Infinium applications and abbreviations

Fonts and Wording

Convention	Description	Example
Italic typeface	Menu options and field names The guide uses the same abbreviations as the screen.	*Work With Controls* Use *Max Lnth* to specify the maximum length of alpha user fields.
Bold standard typeface	Used for notes, cautions and warnings	**Caution:** You must ensure that all Infinium Advanced Planning users are signed off before reorganizing and purging. If there are jobs in the queue, those files will not be reorganized.
`Bold monospaced typeface`	Characters that you type and messages that are displayed	Type **`A`** to indicate that the position is alphanumeric and type **`N`** to indicate that the position is numeric. The following message is displayed: **`Company not found`**
F2 through F24	Keyboard function keys used to perform a variety of commands.	Press F2 to display a list of available function keys.
F13 through F24	Function keys higher than F12 require you to hold down the Shift key and press the key that has the number you require minus 12.	Press F19 to work with project and activity comments.
Select	Choose a menu option or choose a record or field value after prompting.	Select *Work with Customers* and press Enter. Select **`C`** (capitalization), **`E`** (expense) or **`B`** (both) as the *Capitalization code* value.

Convention	Description	Example
Press Enter	Provide information on a screen and when you have finished, press Enter to save your entries and continue.	Press Enter to save your changes and continue.
Exit	Exit a screen or function, usually to return to a prior selection list or menu. May require exiting multiple screens in sequence.	Press F3 to return to the main menu.
Cancel	Cancel the work at the current screen or dialog box, usually to return to the prior screen.	Press F12 to cancel your entries.
Help	To access online help for the current context (menu option, screen or field), press Help (or the function key mapped for help). To move through the other applicable levels of help, press Enter at each help screen. To return directly to the screen from which you accessed help, exit the help screen by clicking Exit or by pressing F3.	Press Help for more information about the current field.
[Quick Access Code]	Quick access codes provide direct access to functions. Some quick access codes in Infinium Advanced Planning consist of the first letter of each word of the menu option name. Quick access codes are listed on the Menu Tree and in the path for each task next to the executable function.	Select *Work with Customers* [WWC].
Publication and course titles	Unless otherwise stated, titles refer to Infinium applications and use standard name and abbreviations.	*Infinium Advanced Planning Guide to Setup and Processing* is referred to as *Infinium MP Guide to Setup and Processing.*

Function Keys

Infinium AM function keys and universal Infinium MP function keys for the IBM AS/400 or ~ iSeries are described in the following table. All Infinium MP function keys are identified at the bottom of each screen.

Function Key	Name	Description
F1	Help	Displays help text
F2	Function keys	Displays window of valid function keys
F3	Exit	Returns you to the main menu
F4	Prompt	Displays a list of values from which you can select a valid entry
F10	Quick Access	Enables you to access another function from any screen Type the quick access code in *Level*. You can change the application designator, such as PA, GL, MP and so forth, by selecting another application.
F12	Cancel	Returns you to the previous screen
F22	Delete	Deletes selected item(s)
F24	More keys	Displays additional function keys at the bottom of the screen

Prompt and Selection Screens

A prompt screen, similar to Figure 1, is the screen in which you type information to access a record or a subset of records in a file.

A selection screen, similar to Figure 2, is the screen from which you select a record or records to perform an action.

When we first explain a task in this guide, we fully document how you access a prompt and selection screen. If a related task uses that prompt or selection screen, we include the prompt and selection steps in that task. However, we do not include the screen(s) again.

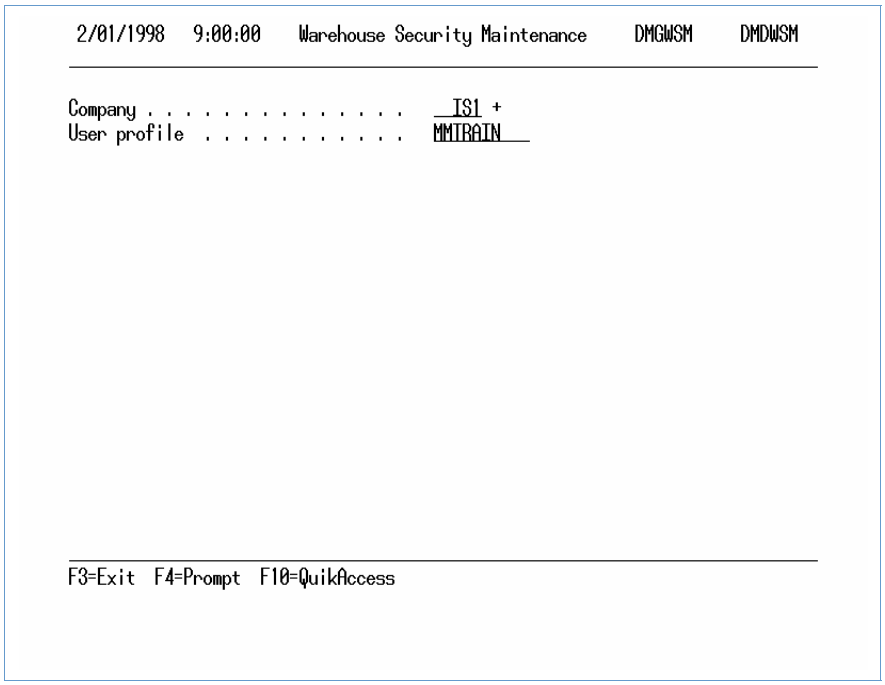


Figure 1: Warehouse Security Maintenance prompt screen

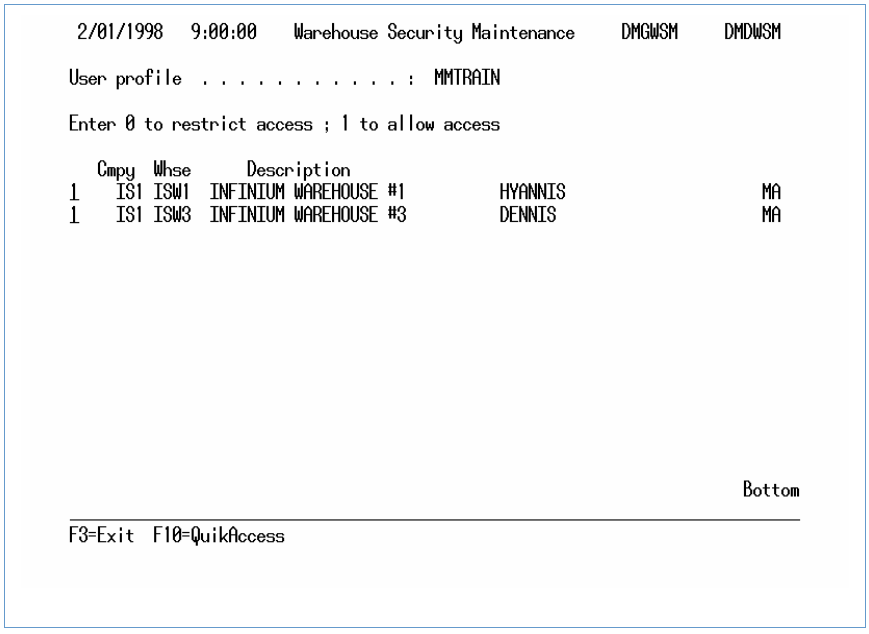


Figure 2: Warehouse Security Maintenance selection screen

Promptable Fields

A plus sign displayed next to a field indicates that you can choose your entry from a list of possible values. Place the cursor in the field and press F4 to display a list of values.

To select an entry perform one of the following:

- Position the cursor at the desired value, type **1** and press Enter.
- Type the value in the appropriate field.

Infinium Applications and Abbreviations

The following table lists Infinium names and the corresponding product abbreviations that are associated with this product.

Application	Abbreviation
Infinium Application Manager Infinium Application Manager Extended	Infinium AM Infinium AM/X
Infinium Query Infinium Query Extended	Infinium QY Infinium QY/X
Infinium Financial Management Suite	**Infinium FM**
Infinium Accounts Receivable	Infinium AR
Infinium Currency Management	Infinium CM
Infinium General Ledger	Infinium GL
Infinium Global Taxation	Infinium GT
Infinium Payables Ledger	Infinium PL
Infinium Project Accounting	Infinium PA
Infinium Purchasing/Payables Exchange	Infinium PX
Infinium Materials Management Suite	**Infinium MM**
Infinium Cross Applications	Infinium CA
Infinium Electronic Exchange	Infinium EX
Infinium Inventory Control	Infinium IC
Infinium Journal Processor	Infinium JP
Infinium Order Processing	Infinium OP
Infinium Purchase Management	Infinium PM
Infinium Process Manufacturing Suite	**Infinium PR**
Infinium Advanced Planning	Infinium MP
Infinium Formula Management	Infinium PF
Infinium Manufacturing Control	Infinium MC
Infinium Advanced Planning	Infinium MP
Infinium Regulatory Management	Infinium RM

Related Documentation

For further information about Infinium Advanced Planning, refer to the following documents:

- *Infinium Cross Applications Guide to System Controls and Materials Maintenance*
- *Infinium Formula Management Guide to Formula Setup and Quality Control*
- *Infinium Inventory Control Guide to Setup and Processing*
- *Program Reference Guide*
- *File/Field Descriptions*
- *Database Relations*
- Online Help

Notes

Part 1
Infinium MP: An Overview

1

The part consists of the following topics:

Infinium MP Overview

Infinium MP is a tool designed to help you improve your manufacturing process. The system gathers and consolidates information about customer orders, purchase orders, and inventory, and provides information about material and resource requirements that will help you:

- Assess manufacturing requirements more accurately
- Schedule manufacturing and purchasing activities based on more accurate requirements
- Plan capacity requirements
- Ensure efficient use of capital items
- Manage inventory activities
- Schedule people and machines appropriately
- Track material, orders, equipment, and resources
- Respond to unexpected problems

The system provides the information you need to efficiently manage the flow of materials and effectively utilize equipment. As a result, you meet customer needs more efficiently, reduce and maintain inventory at lower levels, and reduce lead times and back orders.

At the end of this part, you should understand the Infinium MP system and also be familiar with the following:

- Master Production Scheduling
- Material Requirements Planning
- Display and Reporting Options
- Infinium MP Terminology and Concepts

Understanding Infinium MP

To use Infinium MP to its fullest potential, you must install the following systems:

- Infinium CA: Contains many of the controls and parameters that govern Infinium MP functions and contains raw material and product records.
- Infinium PF: contains formula and bill of materials records for production.
- Infinium OP: contains customer order information.
- Infinium PM: contains purchase order information. You can create purchase requisitions directly from Infinium MP after generating an MPS or MRP.
- Infinium MC: contains information about batches. You can create new batches directly from Infinium MP after generating an MPS or MRP.
- Infinium IC: contains available inventory balances for items on an MPS or MRP.

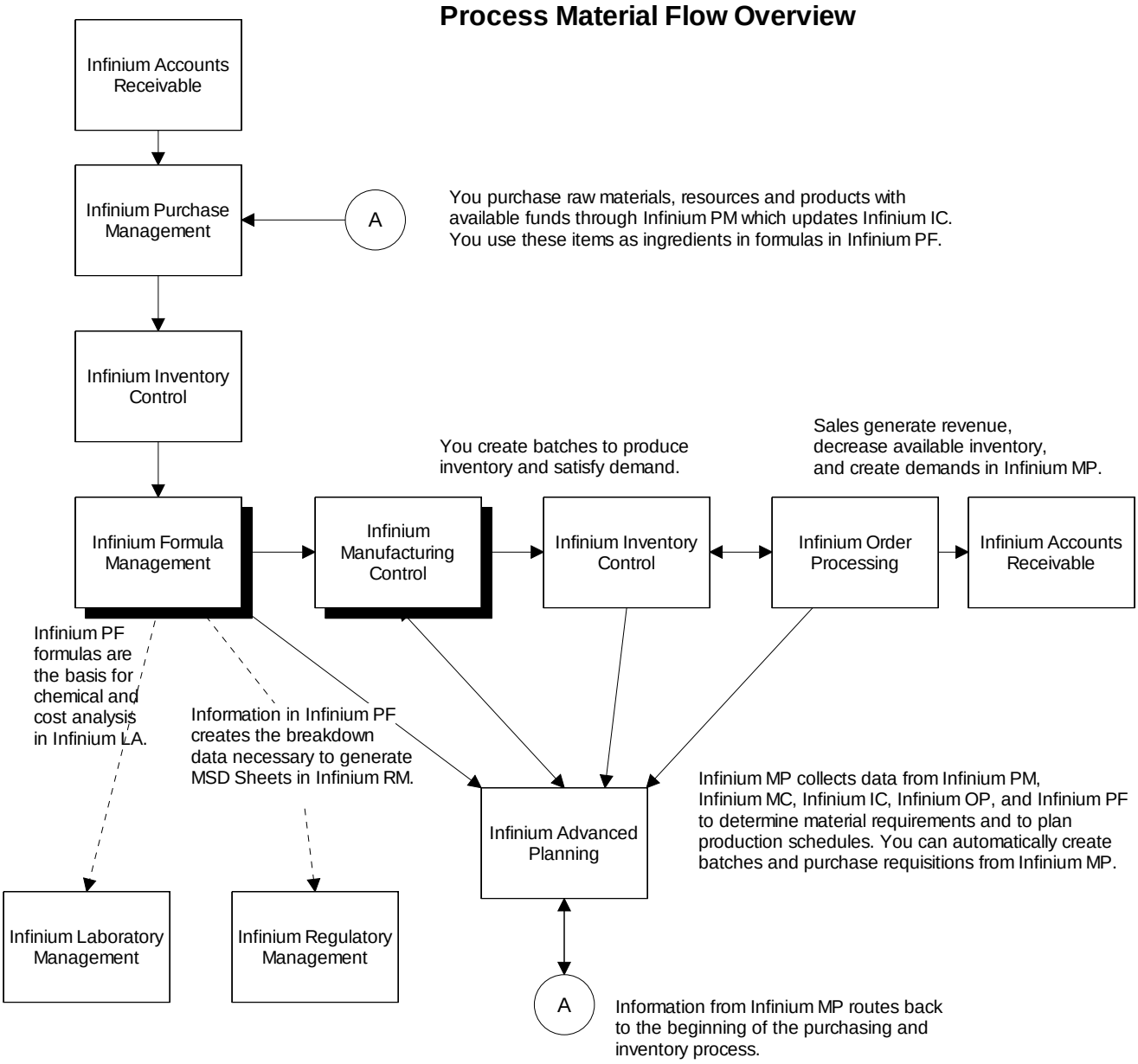


Figure 1-1: Infinium MP Integration

Infinium MP uses the following information:

- Customer orders retrieved from Infinium OP
- Forecast information established through the manual forecasting option in Infinium MP or some other forecasting software you have installed
- Receipts and items on order from Infinium PM
- Batch information from Infinium MC
- Projected available inventory balances from Infinium IC

The system consolidates this information and, from the results of the master production schedule or material requirements plan it generates, you can create purchase requisitions and schedule batches to meet your manufacturing needs.

Master Production Scheduling

Master Production Scheduling is a time-phased planning activity that uses firm and planned quantities of demand, supply, and inventory balances to develop a master production schedule required to meet forecast amounts and customer orders. The *Master Production Scheduling* menu includes the following options, which you use in the order listed.

1. Use the *MPS Generation Selection* option to specify criteria for a plan and generate an MPS. You can generate multiple schedules for the same criteria. After analyzing each, authorize one MPS per company.
2. Use each MPS as the basis for your manufacturing and purchasing decisions. The MPS also serves as the basis for the Material Requirements Plan.
3. Use the *Master Schedule Authorization* option to authorize a Master Production Schedule.
4. Use the *Maintain MPS* option to create batches in Infinium MC or purchase order requisitions in Infinium PM for individual items on a MPS.
5. Use the *Display Master Production Sched* option to view the results of an MPS. The system displays past due quantities and quantities for each time period included in the plan for each of the following categories:
   - Forecast
   - Available
   - Orders
   - Plan Available to Promise
   - Receipts
   - Suggested
   - Firm Planned Orders
6. You can also view the selection criteria for the MPS.
7. Use the *MPS Exception Reporting* option to print a report of selected information from an MPS if you did not generate the report as part of the MPS run.
8. Use the *Demand Fulfillment Workbench* option to change demand requirements to achieve the needed inventory quantities for the MPS and MRP.

Material Requirements Planning

Material Requirements Planning uses the formula or bill of material, inventory data, Master Production Schedule, customer orders, production orders and purchase orders to calculate requirements for materials. The *Material Requirements Planning* menu has the following options, which you use in the order listed.

1. Use the *MRP Generation Selection* option to generate a Material Requirements Plan. Select an MPS on which to base the plan. The system retrieves the formula and bill of material records required to produce the products and explodes them to net the required quantities against the available inventory quantity. This determines the requirements for individual line items: the materials and resources needed to complete production of a particular item.
2. Use the *Maintain MRP* option to create batches in Infinium MC or purchase order requisitions in Infinium PM for individual items on an MRP.
3. Use the *Display Material Requirements* option to view the results of a Material Requirements Plan. The system displays past due quantities and quantities for each time period included in the plan for each of the following categories:
   - Independent Demand
   - Projected On Hand
   - Dependent Demand
   - Planned Order Receipt
   - Receipts
   - Planned Order Release
   - Projected Available
4. You can also view the selection criteria for the MRP.
5. Use the *MRP Exception Reporting* option to print a report of selected information from an MRP.
6. Use the *Demand Fulfillment Workbench* option to change supply and demand requirements to achieve the needed inventory quantities for the MPS and MRP.

Displays and Reporting Options

In addition to the reports available through the *Master Production Scheduling* and *Material Requirements Planning* menus, Infinium MP has several display and report options that provide different types of information to help in your manufacturing planning process.

Terminology and Concepts

This section contains Infinium Software and Infinium MP terminology you should be familiar with before you go on to the detail parts.

Action Messages

The system includes these messages on MRP and MPS displays and reports warning of problems with the plans generated by processing the MRP or MPS. These messages specify the type of action that you should take. For example, action messages can suggest that you create new orders, cancel an existing order, or change an existing delivery date.

Available to Promise (ATP)

The uncommitted portion of your inventory or planned production. Determine the inventory types included in the ATP calculations and how the system handles them in the *Work with Inventory Type File* option in Infinium IC.

Backlog

The sum of all customer orders booked but not shipped; this is also referred to as open orders.

Chase

Chase implies maintaining a constant inventory, as opposed to building an inventory. Chase only involves forecasted values.

Consumption Rules

The rules governing the consumption of the master schedule. Infinium MP provides four consumption methods: forecast, customer orders, the greater of forecast or customer orders, and forecast plus customer orders.

Controlling Warehouse

The system requires a controlling warehouse when you create one MPS plan that includes multiple warehouses. The system uses the MPS controls defined for the controlling warehouse in place of individual warehouse controls. If controls are not set at the controlling warehouse, the system goes up the hierarchy.

Critical Item

Items that you want to include on the Rough Cut Planning report. Define materials and products as critical items in the Item Warehouse file.

Daily Capacity

A quantity you enter for an item in the Item Warehouse file that the system uses as the maximum allowed daily usage for materials and resources. The system uses daily capacity for the Resource Load Summarization display and report and the Rough Cut Planning report.

Days Unit of Measure

A unit of measure used to convert the quantity you enter for a time bucket to a number of days.

Demand Fulfillment Workbench

This central workbench provides a place for production controllers and material managers to manage and correct exception situations. This workbench allows you to reply to multiple action messages to correct and alleviate inventory problems.

Dependent Demand

The type of demand the system calculates for the need to manufacture or replenish inventory for a higher level item. A component used in a subassembly or intermediate would have dependent demand.

Drill Down

A feature of the MPS and MRP display options allowing the user to display detail that makes up each of the theoretical inventory quantities retrieved from Infinium MC, Infinium OP, and Infinium PM. Using these displays, you can “drill down” all the way to the batch, sales order, or purchase order detail for any item on the MPS or MRP.

Entity Formula

A formula that is not associated with a specific company or warehouse. This formula is also referred to as a global formula.

Formula by Effective Date

You can create multiple instances of a formula with different effective dates. These formulas can be at the entity level or can be location-specific. You can use the same formula ID to create multiple instances of a formula and modify the effective dates and ingredients and/or instructions due to seasonal changes.

Formula by Location

Formulas or bills of material that are specific to companies or warehouses. For example, you can create different versions of the same formula or bill of material for a specific location using the same formula identifier or bill of material identifier.

Formula Instance

A single copy of a formula with the same formula identifier for which you modify its attributes to make it a unique formula. You create formula instances for formula variations. For example, you can create an instance of a formula and modify its ingredients, instructions, effective dates, and/or use by a specific location.

Global Formula

A formula that is not associated with a specific company or warehouse. This formula is also referred to as an entity formula.

Gross Demand

The total of independent and dependent demand for a finished item or assembly prior to the netting of on hand inventory and scheduled receipts.

Gross Requirements

The total of independent and dependent demand for a component of a finished good prior to the netting of on-hand inventory and scheduled receipts.

Explode

The method the system uses to determine the demand for the components of a parent item. The system calculates demand by multiplying the parent item requirements by the component item usage specified by the formula/bill of material.

Firm Planned Order

An order, frozen in quantity and time, that only a planner can change. This order status prevents automatic revision by the system.

Forecast Descriptions

A code you define to identify forecasts.

Independent Demand

The type of demand that is unrelated to the demand for other items. Demand for finished products and service parts requirements are examples of independent demand.

Infinium MM Suite

The Infinium MM Suite includes the following applications: Infinium CA, Infinium IC, Infinium PM, Infinium OP, and Infinium JP.

Infinium PR Suite

The Infinium PR Suite includes the following applications: Infinium PF, Infinium MP, Infinium RM, Infinium MC, and Infinium LA. Both the Infinium MM and Infinium PR suites use Infinium CA.

Inventory Types

Use inventory types to categorize different types of real and theoretical inventory. On hand, inspection, and rework are examples of real inventory types. On order from vendor, committed to sales, and work in process usage are examples of theoretical inventory types.

Lead Time

A span of time required to perform an activity. These activities include the procurement of materials and supplies from outside suppliers or from your own manufacturing facility. MPS prints the total lead time at the top of MPS report. The system uses the total lead time to generate the Open Order or Inadequate Lead Time messages.

Lot Size Technique

A method used to determine the order quantity for an item. You can use various lot size techniques, including Lot-for-Lot (L4L), Fixed Order quantity and Lot-for-Lot Min/Max. MPS and MRP generation use the lot size technique when creating planned orders.

Master Production Schedule (MPS)

A statement of what the company expects to manufacture. The MPS is a set of planning numbers that drives the MRP. The MPS takes into account the forecast, backlog, availability of material, management policies, and goals.

Material Requirements Plan (MRP)

An approach for calculating material requirements to generate replenishment orders and to reschedule open orders to meet changing requirements.

Net Requirements

The amount of material that you have to order to cover the difference between the total of current on-hand plus on order and the gross requirements. Net requirements, lot sized and offset for lead time, become planned orders.

Order Type

Used to classify orders in Infinium MC, Infinium PM, and Infinium OP. In Infinium MP, specify the order types to include in the MPS generation.

Pegging

The capability to identify, for a given item, the sources of its gross requirements and/or allocations.

Plan Identifier

A system-assigned code to identify the set of controls and parameters the system uses during the generation of the MPS and MRP.

Planner Code

A user-defined code you assign to an item to identify the planner responsible for that item. Specify the Planner code when generating the MPS or MRP.

Planning Horizons

The period of time measured from the current date to some future date for which you generate material plans.

Product Family

A code used to form groups of materials and products. Specify the product family when generating the MPS or MRP.

Rough Cut Capacity Planning

The process of converting the MPS into capacity needs for key materials and resources.

Safety Stock

The additional inventory and/or capacity carried as protection from forecast errors or fluctuations in the backlog. Establish this quantity in the Item Warehouse file in either Infinium CA or Infinium IC.

Scheduled Receipts

Receipts included on MPS and MRP reports and displays that reflect material quantities from open orders in Infinium MC and Infinium PM.

Starting Inventory

The sum of on-hand inventory plus any inventory types you establish as Other Inventory in the *Work with Inventory Type* option in Infinium IC.

Time Bucket

A time period the system uses to accumulate requirements for MPS and MRP reporting. The period defined by a time bucket depends on the Days Unit of Measure assigned to it.

Time Fence

A policy or guideline you establish to define where various restrictions in operating procedures take place. For example, you can easily make changes to the MPS beyond the cumulative lead time. Changes inside the cumulative lead time become

increasingly difficult as the lead time shortens, to a point where the schedule must be frozen and no changes made. Use time fences to define these points.

Warehouse Security

Warehouse security within Infinium MP restricts the warehouse locations that a user can access. You can change the warehouse security restrictions for Infinium MP by using the Infinium CA *Work with User/Whse Security* function.

Part 2
Maintaining Control Files

2

The part consists of the following topics:

Overview of Maintaining Control Files

Using the Infinium MP *Control Files* menu, define the rules and parameters the system uses to process the master production schedule and the material requirements plan.

Establish controls and parameters at the following levels:

- Entity, where the controls and parameters apply across all companies and warehouses within your organization
- Company, where the controls and parameters are set up for each company and its warehouses
- Warehouse, where the controls and parameters apply only to a specific warehouse within a company

The system retrieves information from these Control files based on a hierarchical search. The system searches the Warehouse Control file first, because it is the lowest in the hierarchy. If the system does not find the required information, it refers to the Company file, and then the Entity file, if necessary. Define controls and parameters at the company and warehouse levels only when you have exceptions to the Control file information at one of the higher levels.

The *Control Files* menu also includes options to define your forecast descriptions, maintain forecasts, establish time buckets, and maintain order type defaults.

After you complete this part, you should be familiar with the setup and maintenance of the Infinium MP Control files.

Maintaining Control Files

The entity, company and warehouse control files combine to form a hierarchy that the system uses when searching for default values during MPS and MRP processing. Beginning at the warehouse level, the search for the first non-blank field continues to the company and ends at the entity level. Using this concept, set your system-wide defaults at the entity level and then only complete the same field at the company or warehouse level when there are exceptions to the level above.

The screens and fields are similar for the options *Work with Entity*, *Work with Company*, and *Work with Warehouse*. The *Work with Entity* option contains all fields; therefore, this part only shows the entity level screens.

Depending on the level at which you establish a control, the control affects:

- Activity system-wide, such as a value entered in the Entity Control file.
- Only a certain company if set up in the Company Control file.
- A single warehouse if set up in the Warehouse Control file.

Use the menu path below.

- *Control Files*
  - *Work with Entity* [WWE] or
  - *Work with Company* [WWC] or
  - *Work with warehouse* [WWW]

Entity Attributes

If you selected *Work with Entity*, the screen below displays.

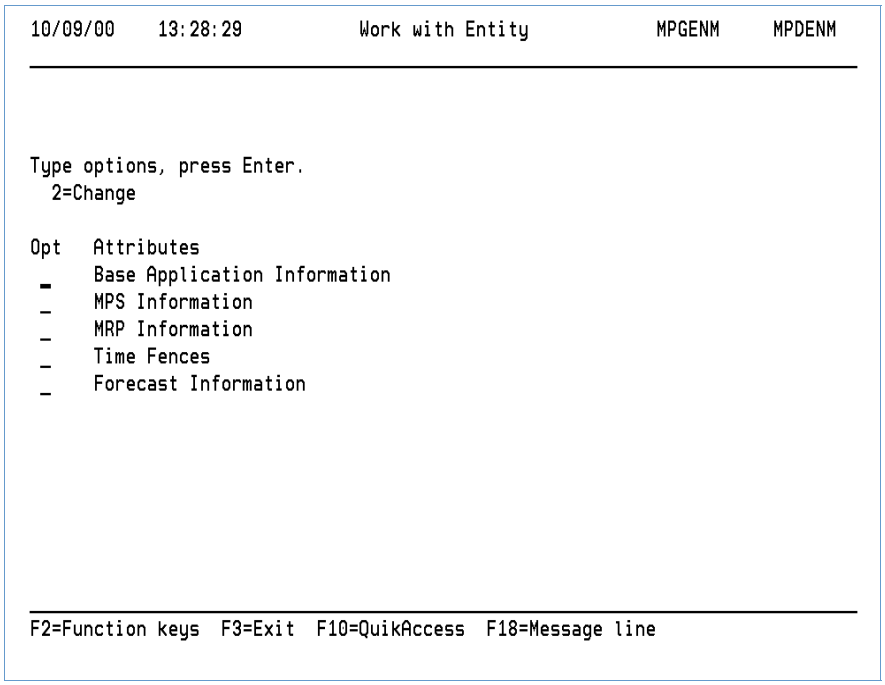


Figure 2-1: Work with Entity Attribute selection screen

Type **2** in the *Opt* field to select one or more attribute and press Enter.

If you select more than one attribute, as you complete each attribute screen, the system automatically moves on to the next attribute.

Base Application Information

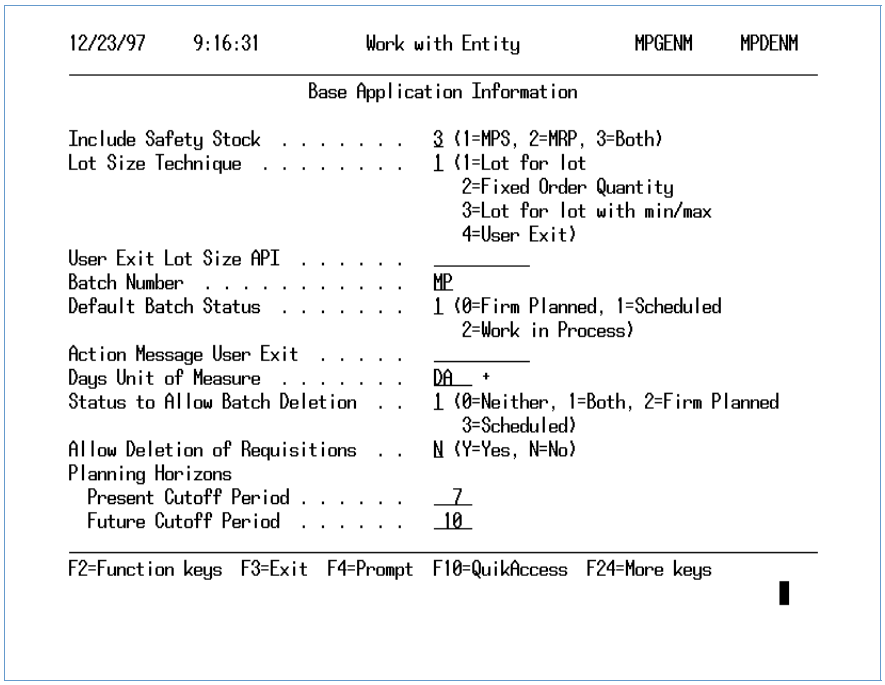


Figure 2-2: Base Application Information screen

Lot Size Technique

The lot size technique you use determines how the system orders products or materials.

1 Lot for Lot	The system generates planned orders in quantities equal to the net requirements in each period. An exact match is made.
2 Fixed Order Quantity	The system generates planned orders for a predetermined fixed quantity. Define this quantity in the *Order Policy Quantity* field or multiples thereof in the *Order Multiple Quantity* field. These fields are in the Item Warehouse file.
3 Lot for Lot with Min/Max	This method is similar to the Lot for Lot except that the system must order at least a minimum quantity, which you establish in the *Order Policy Quantity* field. The order quantity cannot exceed the value in the *Maximum Reorder Quantity* field or fall below the amount in the *Minimum Quantity* field. These fields are in the Item Warehouse file.
4 User Exit	Establish unique lot sizes through your own or non-Infinium programs.

Batch Number
The system assigns the value you type in the *Batch Number* field as the first two characters of the batch number assigned to any manufacturing orders created through Infinium MP. This assists you in identifying batches automatically created by Infinium MP.

Set up or reset the batch number for this batch identifier using the *Reset Manufacturing Batch Number* option in the *Utilities* menu.

If there is not a batch identifier in the *Batch Number* field, the system retrieves the batch identifier defined in Infinium MC.

Default Batch Status
This value determines the stage of the batches created by MRP or MPS.

Days Unit of Measure
Use this field to define a day in terms of production and material planning. The value you type must first be set up in the *Work with UM Conversion* option in Infinium CA. Refer to the *Infinium Cross Applications Guide to System Controls and Materials Maintenance* for information on setting up units of measure.

When you generate the Master Production Schedule as described in the "Master Production Scheduling" part, the system uses the *Days Unit of Measure* field to convert the units established in the *Work with Time Buckets* option to determine the starting dates for the time buckets in the MPS and MRP.

When you define the unit of measure **`Day,`** you should also establish other units of measure for each time period that includes days, such as **`Week`** or **`Mnth`**. The conversion factor for each of these must be equal to the number of days in that time period. For example, use **`5`** for **`Week`** or **`30`** for **`Mnth`**.

Status to Allow Batch Deletion
Use this field to define which batch status, if any, you can delete through the Demand Fulfillment Workbench.

`0 Neither`	You cannot delete batches from the Demand Fulfillment Workbench.
`1 Both`	You can delete both Firm Planned and Scheduled batches.
`2 Firm Planned`	You can only delete Firm Planned batches.
`3 Scheduled`	You can only delete Scheduled batches.

You cannot delete Work in Process batches from the Demand Fulfillment Workbench.

Allow Deletion of Requisitions
Type **Y** in this field to allow the deletion of requisitions from the Demand Fulfillment Workbench.

In order to use this feature, a user profile must exist in Infinium PM with the proper security to delete requisitions.

When deleting requisitions, be careful to view each line item of the requisition to ensure that line items of products other than those needed by Infinium MP are not deleted.

A user profile must exist in Infinium PM in order to maintain requisitions also.

Planning Horizons

The *Planning Horizons* fields determine the MPS requirements that the system feeds to the MRP, and are separated between current and future periods.

Planning Horizons Present Cutoff Period
This period includes the period from the MPS start date through the period you type in this field. The system limits calculated requirements to the firm planned orders from the MPS due through the end of this period.

Planning Horizons Future Cutoff Period
This period includes the period from the Present Cutoff Period through the period you type in this field. The system limits calculated requirements to the firm planned orders and suggested orders from the MPS due through the end of this period.

MPS Information

Use the screen below to define MPS setup information.

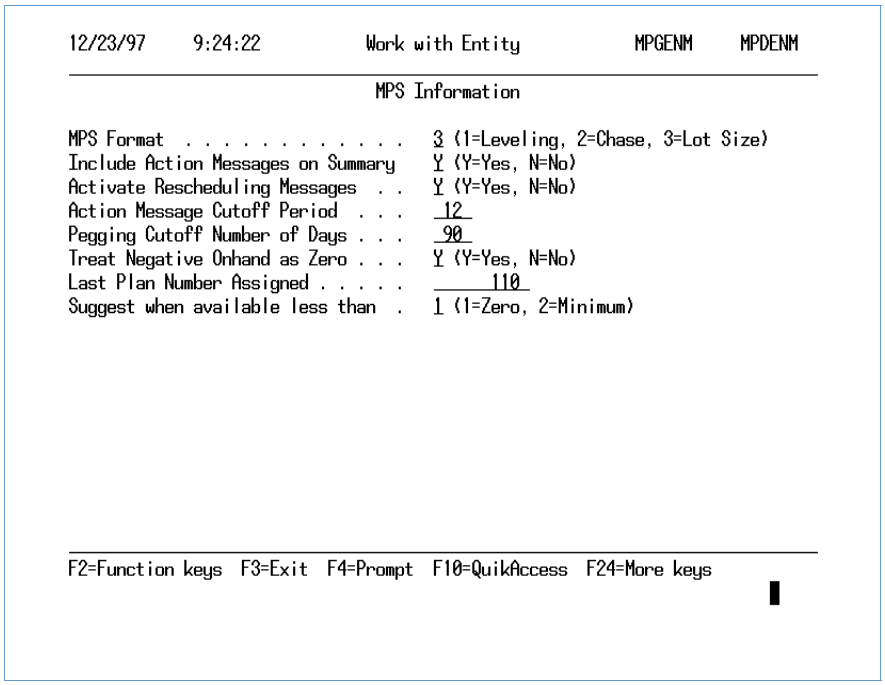


Figure 2-3: MPS Information screen

MPS Format

This determines how the MPS calculates material requirements.

1 Leveling	The system totals and averages the requirements for all the time periods within the MPS schedule. The calculated average becomes the suggested reorder quantity for each period.
2 Chase	The system suggests the forecast amount calculated for the time bucket.
3 Lot Size	The system reorders material based on the method you select in the *Lot Size Technique* field on the Base Application Information screen.

Treat Negative Onhand as Zero

Type **Y** in this field if you do not want the MPS to reflect negative beginning inventory balances. This causes the system to set the beginning inventory balance to zero for the MPS calculation, which affects only the MPS calculation, not actual inventory balances.

Type **N** to use the negative quantity as the starting inventory.

Suggest when available less than

If you type **1** in this field, MPS suggests a quantity when available inventory falls below zero. The system bases the quantity suggested on the lot size technique. Define the lot size technique for each item in the *Work with Item Warehouse* option in Infinium IC.

If you type **2** in this field, the system suggests a quantity when available inventory falls below the minimum quantity. Define the minimum quantity for each item in the *Work with Item Warehouse* option in Infinium IC.

The system bases the suggested quantity on the lot size technique and this affects the net requirements used in the lot size calculation. The net requirements include the quantity necessary to return the available balance to the minimum.

The system uses the following formula to calculate available inventory for MPS calculations:

Available = starting inventory + MPS + firmed planned orders + scheduled receipts - demand

The system calculates the demand component in this formula based on the consumption rule you define using the Time Fences attribute.

The action message cutoff is by period and the pegging cutoff is by days.

MRP Information

Use the screen below to define MRP setup information.

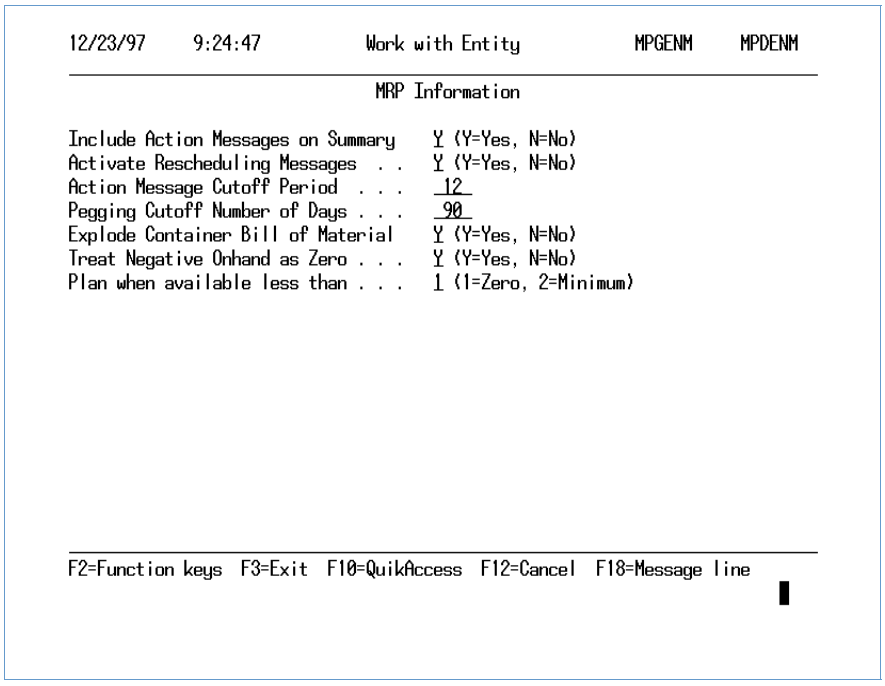


Figure 2-4: MRP Information screen

Treat Negative Onhand as Zero

Type **Y** in this field if you do not want the MRP to reflect negative beginning inventory balances. This causes the system to set the beginning inventory balance to

zero for the MRP calculation. This affects only the MRP calculation, not actual inventory balances.

Type **N** to use the negative quantity as the beginning inventory.

Plan when available less than
If you type **1** in this field, MRP suggests a quantity when available inventory falls below zero. The system suggests a quantity based on the lot size technique. Define the lot size technique for each item in the *Work with Item Warehouse* option in Infinium IC.

If you type **2** in this field, the system suggests a quantity when available inventory falls below the minimum quantity. Define the minimum quantity for each item in the *Work with Item Warehouse* option in Infinium IC.

The system suggests a quantity based on the lot size technique and this affects the net requirements used in the lot size calculation. The net requirements include the quantity necessary to return the available balance to the minimum.

The system uses the following formula to calculate available inventory for MRP calculations:

> *Available = starting inventory - independent demand - dependent demand + receipts + planned order receipts*

The action message cutoff is by period and the pegging cutoff is by days**.**

Time Fences

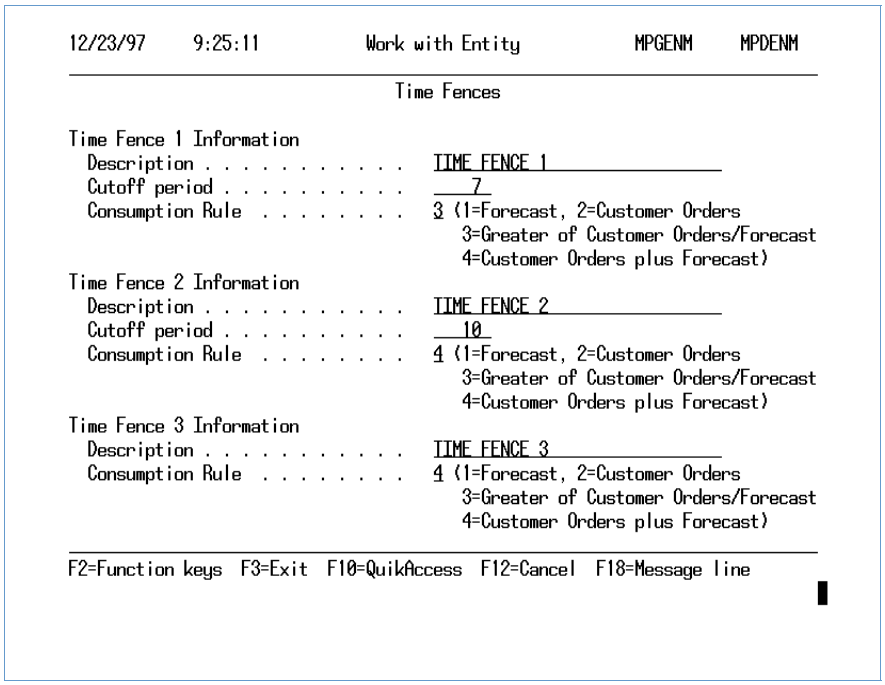


Figure 2-5: Time Fences screen

Use this screen to define the consumption rules for the MPS. Time fences are guidelines you establish to note where various restrictions or changes in operating procedures take place. The consumption rule merely tells the schedule how to consume the available inventory.

Cutoff period

The value you type in these fields identifies the last time bucket to include in that time fence.

Defining Forecast Information Controls

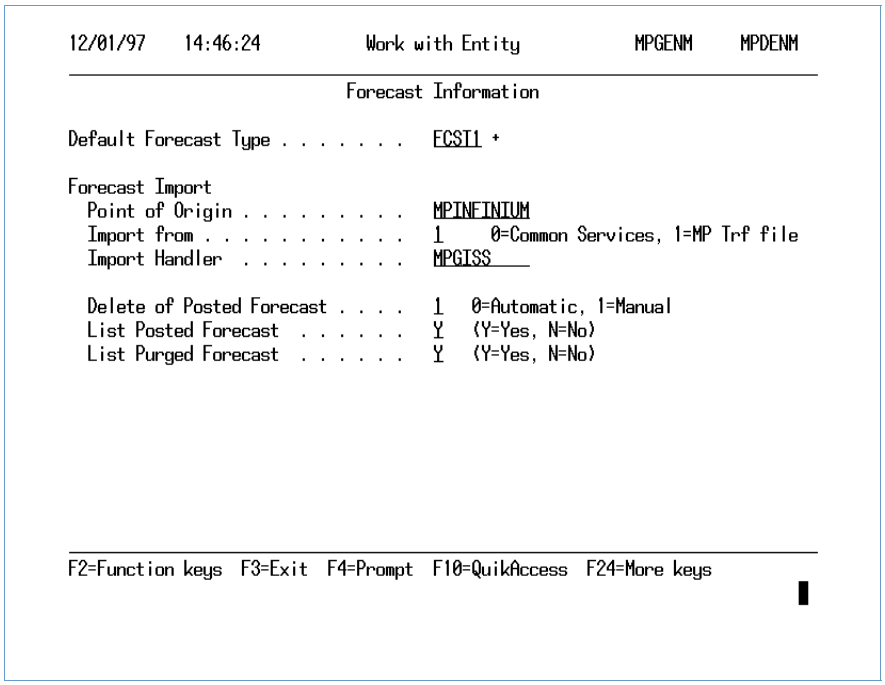


Figure 2-6: Forecast Information screen

Prior to uploading any forecasts you must define some controls in Infinium MP. All fields are available at the entity level, and limited fields are at the company and warehouse levels.

Default Forecast Type
Use this field to establish your valid default forecast type. You can override this when you create forecasts in Infinium MP and when you edit any imported forecasts.

Point of Origin
This field identifies the source application of the data you import. This value defaults into the *Import Forecast* option. This field is for informational purposes only.

Import from
Use this field to identify the normal storage location of the transferred data. This value defaults into the *Import Forecast* option. Type **0** if you transfer the forecast data into Common Services, or type **1** if you transfer the forecast data into the Infinium MP Transfer file, MPPTF.

Import Handler
Use this field to identify the program to run that should retrieve the transferred forecast data and populate the Imported Forecast file, MPPIF.

You need to specify a program name in the *Import Handler* field only if you are using a custom program. If you are not using a custom program, leave this field blank

and the system uses either the MPGICS or MPGISS program. The system determines the program to use by your entry in the *Import from* field.

The value in the *Import Handler* field defaults into the *Import Forecast* option.

Delete of Posted Forecast
Use this field to specify how the system should handle the deletion of posted records within the Imported Forecast file, MPPIF.

You may choose to delete records automatically when you post them. To do this, type **0** in this field.

To retain posted records after posting, type **1** in this field. This way you can control when the system deletes records from the Imported Forecast file by using the purge feature.

If you type **0** in the *Forecast Import Delete of Posted Forecasts* field and **Y** in the *Forecast Import List Purged Forecast* field, the system automatically generates the Imported Forecast Post and Purge report whenever you post forecasts. If you purge forecasts with the previously mentioned settings, the system generates the Imported Forecast Purge report. If you type **1** in the *Forecast Import Delete of Posted Forecast* field and **Y** in the *Forecast Import List Posted Forecast* field, the system automatically generates the Imported Forecast Post report whenever you post forecasts. A sample of these reports is in the "Infinium MP Reports" appendix.

List Posted Forecast
Type **Y** in this field if you want the system to print a list of successfully posted forecasts after posting occurs.

List Purged Forecast
Type **Y** in this field if you want the system to print a list of successfully deleted forecasts after the purge occurs.

If you access this attribute in the warehouse or company level, the *Forecast Import Point of Origin*, *Import from*, and *Import Handler* fields are not available.

Press Enter , then F3 and answer the Confirmation window with **1** and Enter to save your entries.

Working with Forecast Descriptions

Use this option to create the forecast descriptions the system uses when you create forecasts. You also specify whether or not the system should include a particular forecast when you generate the MPS.

Use the menu path below.

- *Control Files*
  - *Work with Forecast Description* [WWFD]

Forecast Types

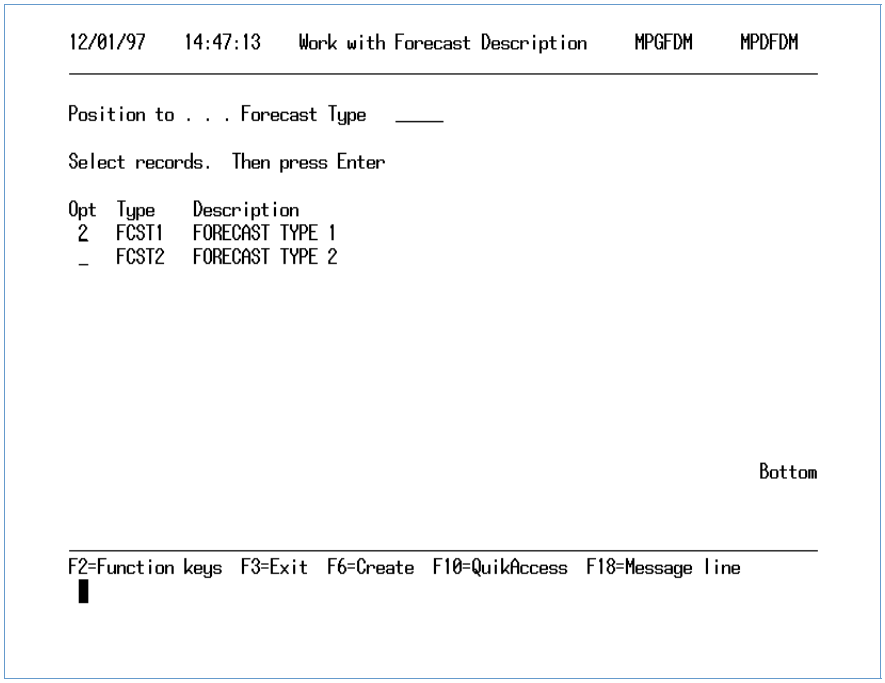


Figure 2-7: Work with Forecast Description prompt screen

To create a new forecast description, type the code in the *Forecast Type* field and press F6.

Type any character in the *Opt* field and press Enter to work with an existing forecast type.

Reposition the list of forecast types by typing all or part of a type in the *Forecast Type* field and pressing Enter. The system redisplays the list beginning with the forecast type closest to your entry.

When you change a forecast description, the system updates the Forecast file and the Order Type Default file.

Forecast Descriptions

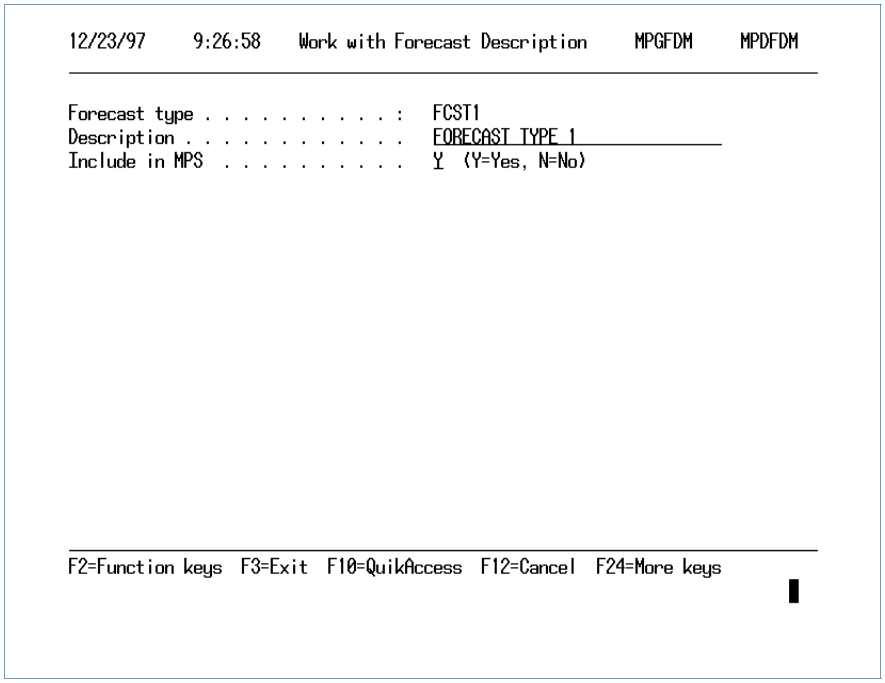


Figure 2-8: Work with Forecast Description screen

Type **Y** in the *Include in MPS* field to include any forecasts with this forecast type in the MPS. The system also places a **Y** in the *Sel* field in the Order Type Default file as shown later in this part.

Type **N** to exclude this forecast type. You can override this setting when you generate the MPS.

If you change the *Include in MPS* field to **N** at a later time, you must also make the change in the *Work with Order Type Defaults* option. After the initial set-up, the system does not reflect the change in the Order Type Default file for advanced planning processing.

Press F22 to delete a forecast type. If a forecast exists for this type, you cannot delete it until you remove the forecast.

Maintaining Forecasts

Use this option to create forecasts. For each product, specify the forecast dates and the quantities required.

You can include products on more than one forecast.

Use the menu path below.

- *Control Files*
  - *Work with Forecast* [WWF]

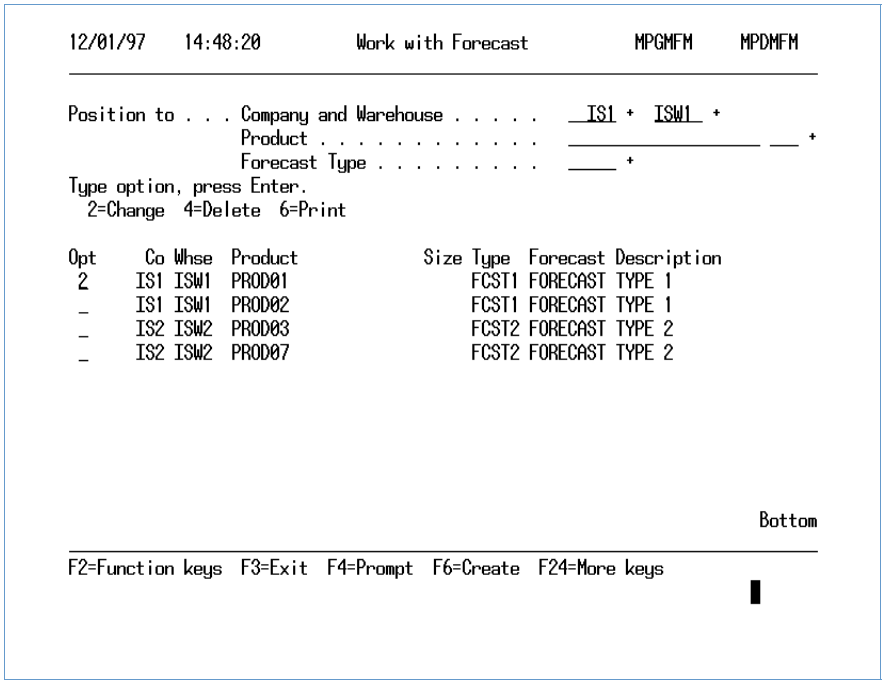


Figure 2-9: Work with Forecast selection screen

To create a new forecast, complete the *Position To* fields and press F6.

Type **2** in the *Opt* field and press Enter to work with an existing forecast.

Reposition the list of forecasts by completing all or part of the *Position To* fields and pressing Enter. The system redisplays the list beginning with the forecast closest to your entry.

To delete a forecast, type **4** beside the forecast and press Enter twice.

Forecast Attributes

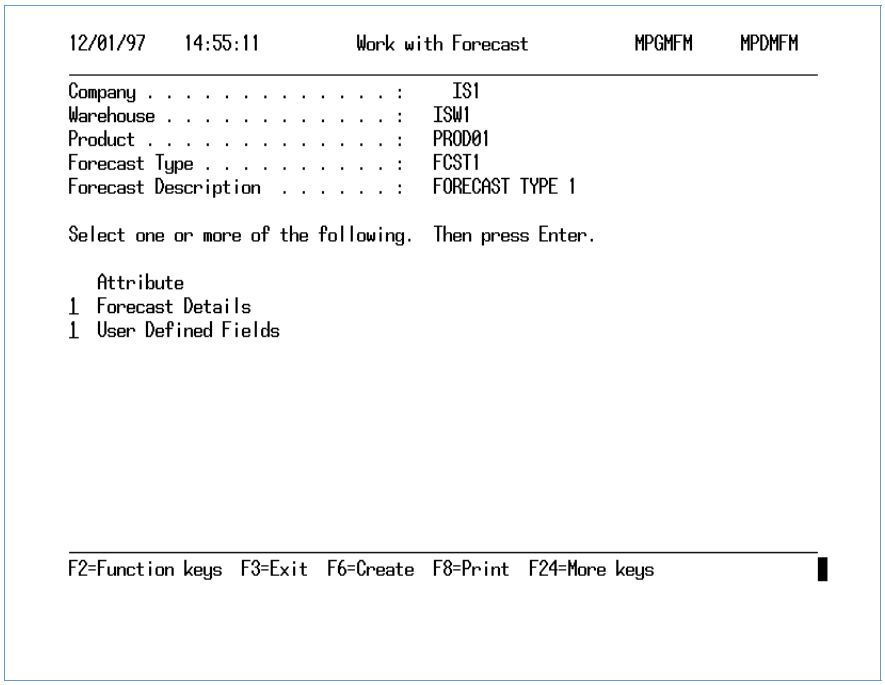


Figure 2-10: Work with Forecast Attribute selection screen

Type any character in the field to the left of the attribute you want to maintain and press Enter.

Forecast Specifics

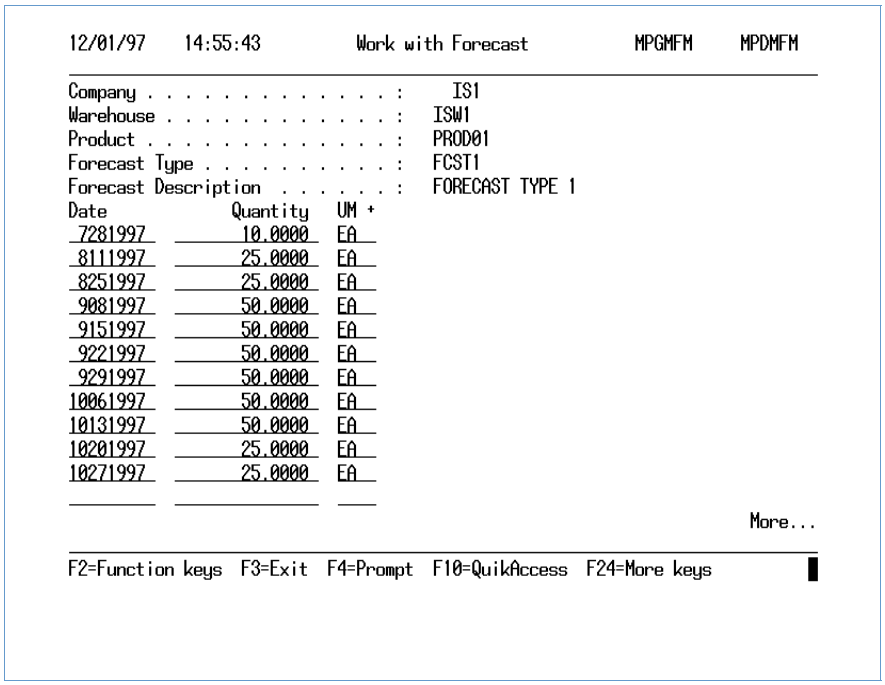


Figure 2-11: Forecast Details screen

Type the forecast dates and quantities to create your forecast. If you complete all the lines on this screen, press the PgDn key for more lines.

UM

This field defaults to the inventory unit of measure. You can override the default value with any other valid unit of measure. Regardless of the unit of measure you enter here, the MPS reports and displays show the quantities in the inventory unit of measure.

User Defined Fields

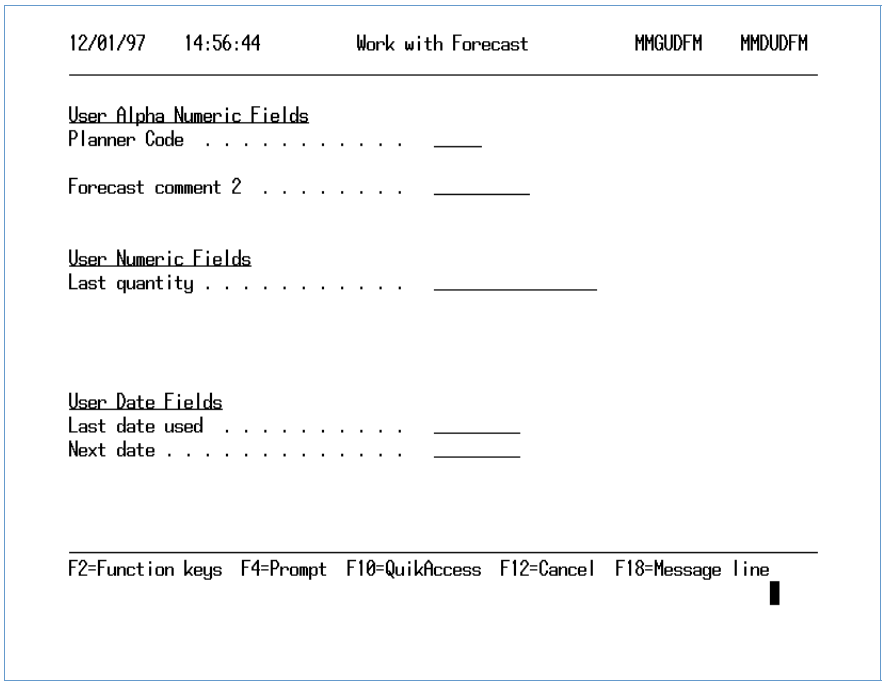


Figure 2-12: Work with Forecast User-Defined Fields screen

The system does not include data you type in these fields in any of the standard displays and reports, but stores the information in the MPS data files. Access this information with Infinium Query.

Maintaining Time Buckets

Use this option to establish time bucket (period) ranges the system uses when generating the Master Production Schedule and the Material Requirements Plan.

Use the menu path below.

- *Control Files*
  - *Work with Time Buckets* [WWTB]

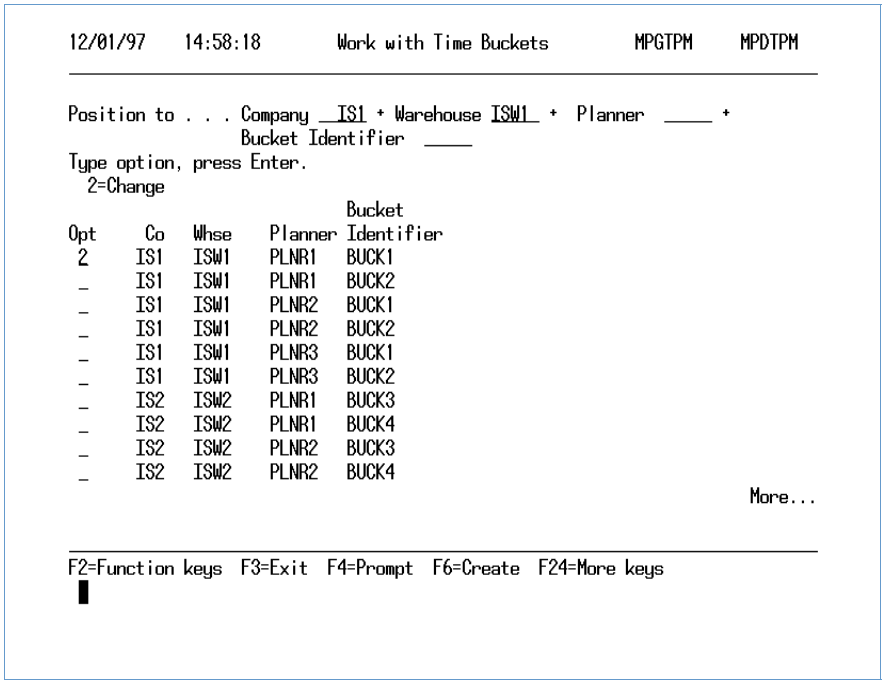


Figure 2-13: Work with Time Buckets selection screen

To create a time bucket identifier, complete the *Position To* fields and press F6.

Type **2** in the *Opt* field and press Enter to work with an existing time bucket identifier.

Reposition the list of identifiers by completing all or part of the *Position To* fields and pressing Enter. The system redisplays the list beginning with the time bucket identifier closest to your entry.

The system requires entries in the *Company*, *Planner*, and *Bucket Identifier* fields. Leave the *Warehouse* field blank to create company level time buckets that are used by all warehouses within the company specified.

Time Bucket Attributes

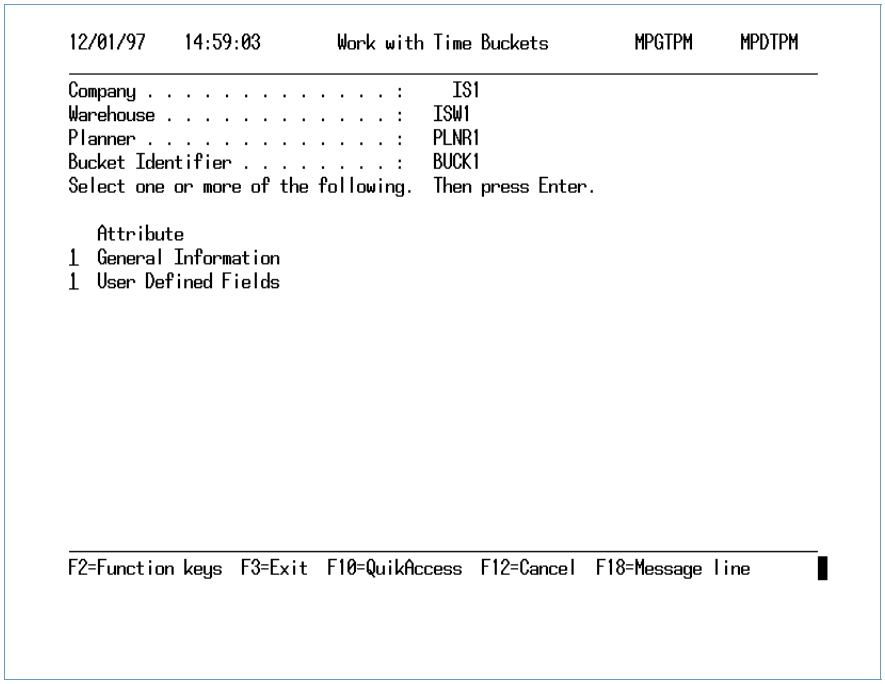


Figure 2-14: Work with Time Buckets Attribute selection screen

Type any character in the field to the left of the attribute you want to maintain and press Enter.

Time Bucket Definitions

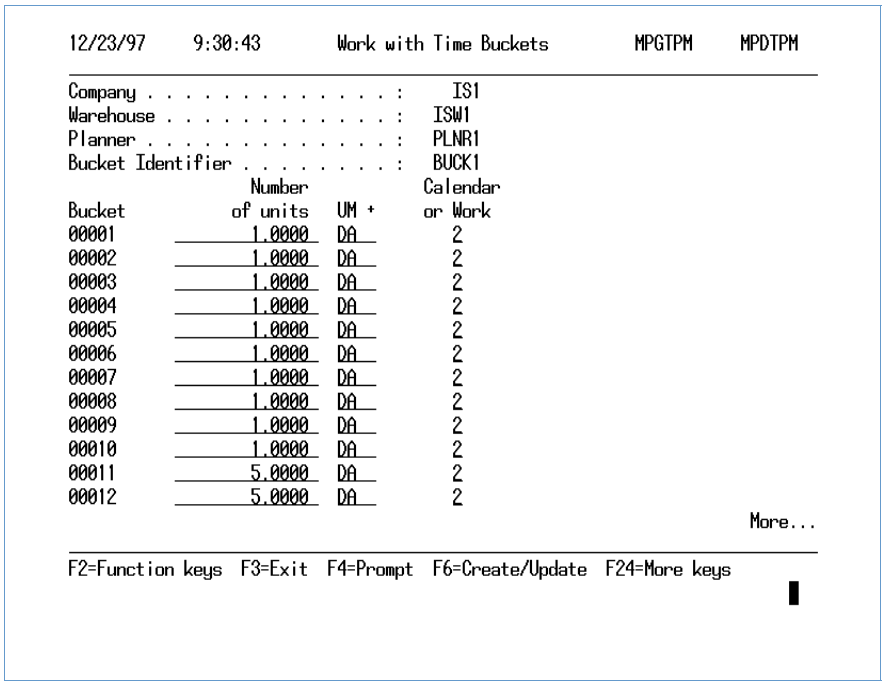


Figure 2-15: Work with Time Buckets screen

Establish time buckets in units of measure that the system can convert to the unit of measure you typed in the *Days Unit of Measure* field in the *Work with Entity* option. For example, 1 Week can be converted to 5 Days, and 1 Mnth can be converted to 30 Days.

To further illustrate, if you type **6** in the *Number of units* field and **Mnth** in the *UM* field, where **Mnth** is equal to 30 days, as defined in Infinium CA, the system calculates 180 Days for the time bucket. First, the system converts 1 Mnth to 30 Days, and then multiplies this by the value you typed in the *Number of units* field.

Regardless of whether you choose work days or calendar days, you must first define the working day calendar in the *Work with Calendar* option in Infinium CA.

User Defined Fields

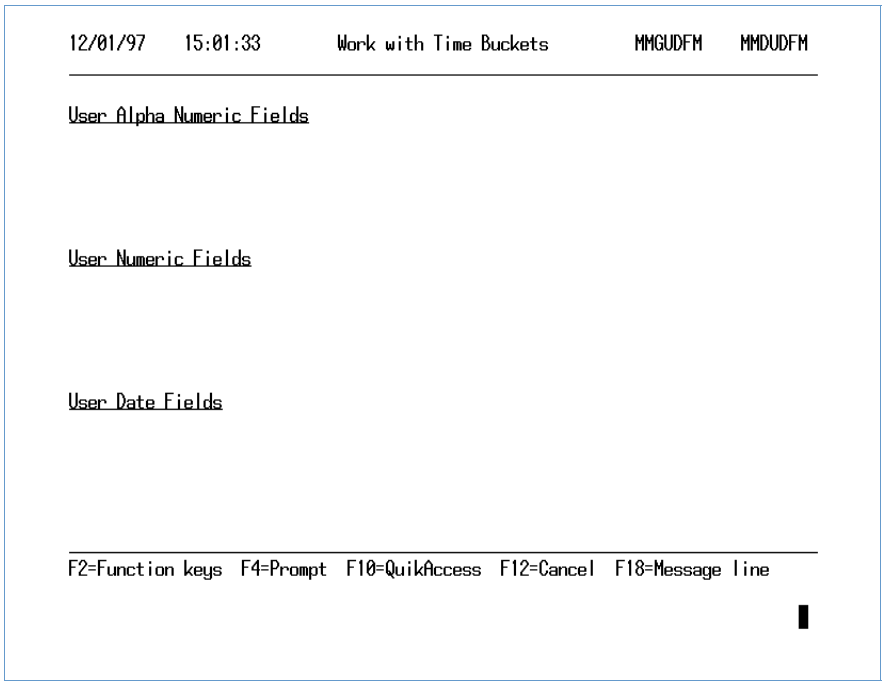


Figure 2-16: Work with Time Buckets User-Defined Fields screen

The system does not include the data you type in these fields in any of the standard displays and reports, but stores the information in the MPS data files. Access this information with Infinium Query.

Working with Order Type Defaults

Use this option to specify which order types to include in the master schedule selection process.

Use the menu path below.

- *Control Files*
  - *Work with Order Type Defaults* [WWOTD]

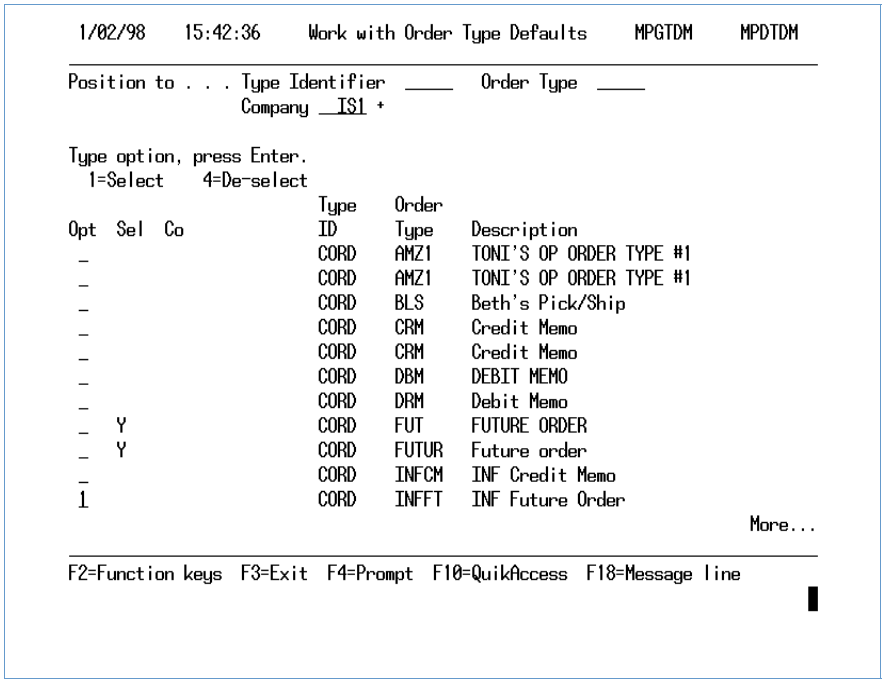


Figure 2-17: Work with Order Type Defaults selection screen

This file consists of all the order types from:

- Infinium OP
- Infinium PM
- Infinium MC
- Forecasts in Infinium MP

Type **1** in the *Opt* field for each order type you want to include and press Enter. The system displays **Y** in the *Sel* field for each order you select. Type **4** in the *Opt* field beside previously selected order types you want to exclude.

Regardless of your selections here, you can override these order types when you generate the MPS.

Recalculating Low Level Codes

The system uses Low Level codes during MRP generation to reduce the processing time. The Low Level code identifies the lowest level in any formula/bill of materials at which a material appears.

You must run the recalculation for all formulas at least once. Thereafter you should determine which formulas need recalculating when, based on your extent of formulation changes.

During processing, at each level of the formula/bill of materials that a material is used, the system accumulates requirements passed from the MPS and/or its parent item. The system maintains a running total until the level being processed matches the material's Lowest Level code. At that point, the system calculates all requirements and receipts and the netting process determines if you need planned orders.

Use the menu path below.

- *Control Files*
  - *Recalculate Low Level Codes* [RLLC]

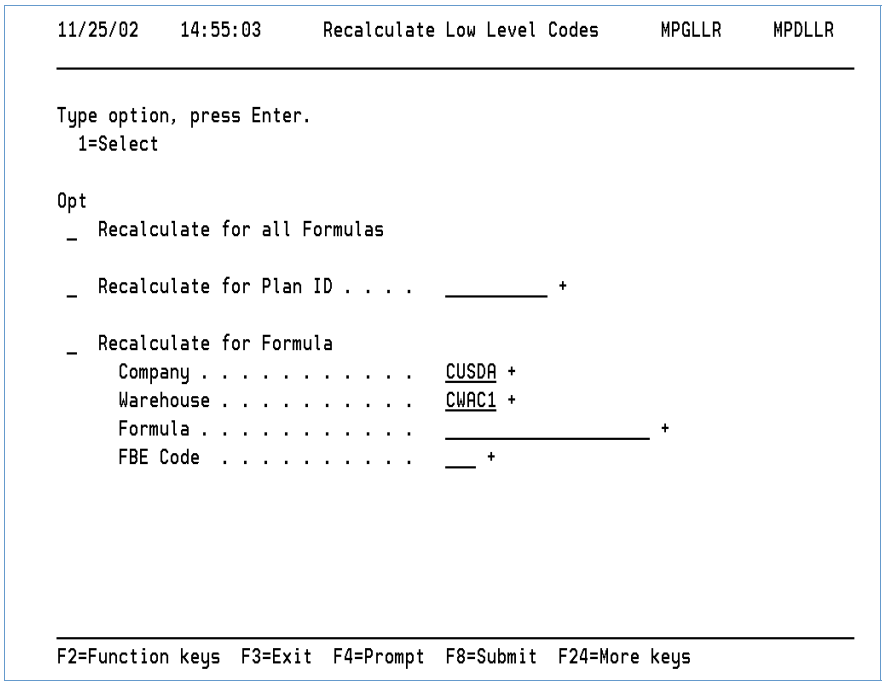


Figure 2-18: Recalculate Low Level Codes screen

Select *Recalculate for Plan ID* to include all formulas for the products included in the Plan ID you type.

If you have multiple instances of a formula and have the proper authority, the *Company* and *Warehouse* fields display. You can specify the instance of the formula to recalculate by specifying a value for *Company* and *Warehouse* in *Recalculate for Formula.* To specify a company formula, leave *Warehouse* blank. To specify an entity formula, leave both *Company* and *Warehouse* blank.

Within each level, the system checks the effective dates for a formula instance against the system date to determine which formula instance to use.

FBE Code
Specify the FBE code of the formula instance for which you want to recalculate low level codes.

Type **1** in the *Opt* field next to the desired option and press F8 to begin processing.

Defining User Selections

Define how the Demand Fulfillment Workbench displays by user through the *Work with User Selections* option in Infinium CA.

Use the menu path below.

- *Control Files*
  - *Work with User Selections* [WWUS]

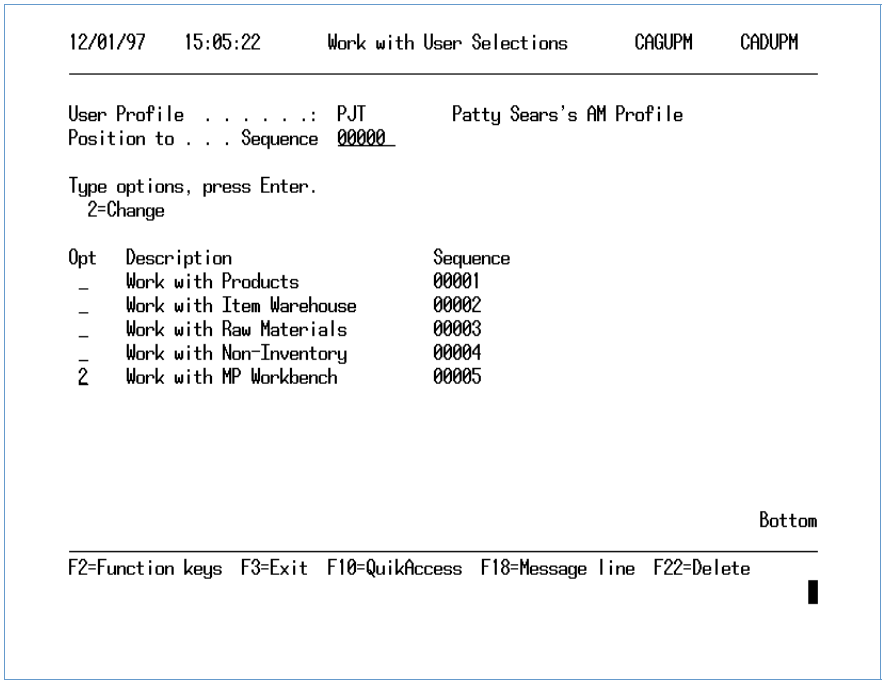


Figure 2-19: Work with User Selections selection screen

Type **2** beside Work with MP Workbench and press Enter to define defaults for the Demand Fulfillment Workbench.

The Work with MP Workbench selection only displays if **Y** is in the *Use Advanced Planning?* field on the Base Application Information screen in the Infinium CA Entity Control file, and if **S2K** is in the *Advanced Planning* field in the Infinium CA Entity Control file.

Defining MP Workbench Defaults

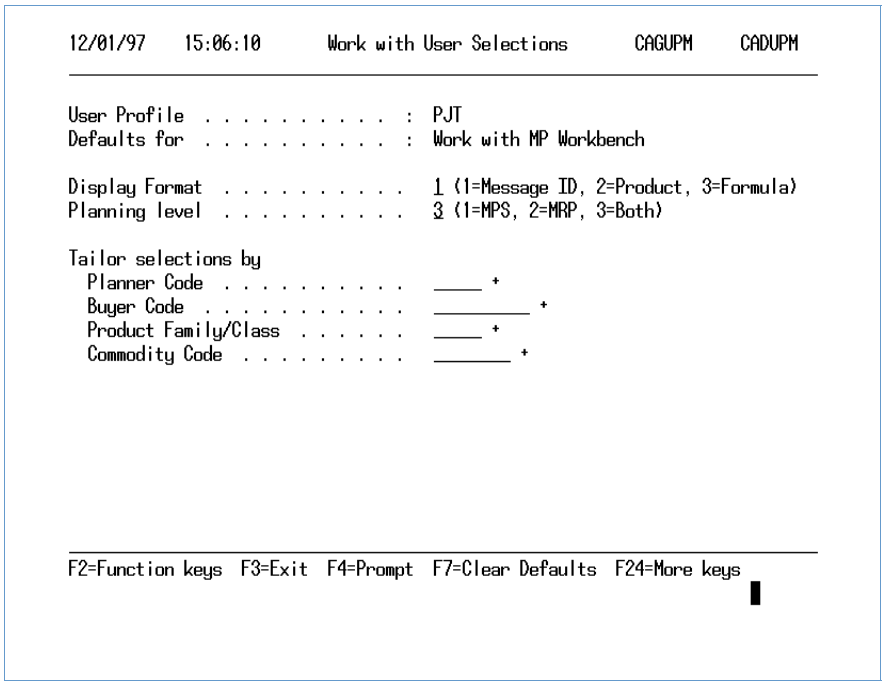


Figure 2-20: Work with User Selections MP Workbench screen

Use this screen to determine the defaults for the Demand Fulfillment Workbench. You can override these defaults in Infinium MP.

Display Format
Use this field to determine if the Demand Fulfillment Workbench displays by **1** (Message ID), **2** (Product), or **3** (Formula). If you leave this field blank, the system displays the workbench by Message ID.

Planning level
Use this field to determine the type of messages you want to display in the Demand Fulfillment Workbench. Type **1** for MPS messages only, **2** for MRP messages only, and **3** for both. If you leave this field blank, the system displays both MPS and MRP messages in the workbench.

Press Enter to accept these entries.

Checks to Perform Prior to Generating MPS and MRP Plans

Be sure you define the following fields and options appropriately before you use Infinium MP. Remember that to generate a MPS or MRP plan, you need to have demand requirements on the system (manufacturing usage and orders) and a supply of inventory (beginning balances plus purchase order receipts and manufacturing production). You must also have formulas in Infinium PF.

Infinium CA

Menu Level	Options	Specifics
Control Files	*Work with Entity Controls*	In the Entity Control file on the Base Application Information screen, set the *Use Advanced Planning* field to **Y**. On the System Information screen, you must indicate that Advanced Planning is **S2K**. Also, indicate you use the Available to Promise display on the Available to Promise screen.
Control Files	*Work with User Selections*	This is optional. Define defaults for the Demand Fulfillment Workbench via the Work with MP Workbench attribute within the *Work with User Selections* option.
Code Files	*Work with Calendar* *Work with Lead Time Control*	The system uses the calendar in conjunction with time buckets. Using the *Work with Lead Time Control* option, you must complete the MPS and MRP columns.
Master Files	*Work with UM Conversion*	You must define the Day unit of measure in the Unit of Measure Conversion file.

Menu Level	Options	Specifics
Master Files	*Work with Item Warehouse File* (also in Infinium IC) Or you can access this through *Work with Raw Material/Resource or Work with Products*	In the Item Warehouse file, you must plan how you define fields that the system may use with Infinium MP. Infinium MP uses the following fields on the General Information screen: *Daily Capacity*, *Daily Capacity Unit of Measure*, *Order Strategy*, *MPS Format*, *Lot Size Technique*, and *Critical Resource*. The *Daily Capacity*, *Daily Capacity Unit of Measure*, and *Critical Resource* fields are not mandatory. In Infinium MP, set defaults in the Control files for MPS Format and Lot Size Technique. On the second Inventory Information screen, Infinium MP checks the quantity fields depending on your lot size technique. • If you use the fixed order quantity technique, the system requires entries in the *Order Policy/Lot Size Quantity* and *Order Multiple Quantity* fields. • If you use lot for lot with min/max, then the system requires entries in the *Order Policy/Lot Size Quantity*, *Minimum Quantity*, and *Maximum Reorder Quantity* fields. You also must define the *Automatic Creation Method* field to determine if the system automatically creates needed batches or sends them to a Work file. This also controls whether the system automatically creates purchase requisitions for needed items or sends them to a Work file. On the Lead Times screen, the system uses the fields you indicated on the lead time matrix in the *Work with Lead Time Control* option.

Menu Level	Options	Specifics
Control Files	*Work with Inventory Type File*	Define the MPS/MRP column so Infinium MP can determine supply and demand. This is only for the Product Requirements report and display. The system determines supply and demand for the Master Production Schedule and the Material Requirements plan by the order types you include. You must define the Available to Promise display column also.

Additional Items You Must Define in Infinium MP

1. All fields within the Infinium MP Entity Control files. This includes settings for the following:
   - lot size technique
   - planning horizons
   - time fences
2. Forecasts, if you plan to use them, in the *Work with Forecast Description* and *Work with Forecast* options in the Infinium MP Control files.
3. Time buckets in the *Work with Time Buckets* option in the Infinium MP Control files.
4. You must select order types, if you plan to use them on MPS/MRP, in the *Work with Order Type Defaults* option in the Infinium MP Control files.
5. You must run the *Recalculate Low Level Codes* option for all formulas at least once. This option is in the Infinium MP Control files.

Part 3
Master Production Scheduling

3

The part consists of the following topics:

Overview of Master Production Scheduling

The Master Production Schedule (MPS) represents a time-phased planning tool using planned and firm quantities of supply, demand, and inventory balances for each of the items you specify. The system derives supply and demand from multiple sources including Infinium IC, Infinium OP, Infinium MC, Infinium PM, and manual forecasts you create in Infinium MP.

The system allows you to define multiple plans, each containing different assumptions and yielding different MPS results. This feature allows you to create master production schedules based on different criteria providing “what-if” scenarios.

After you complete this part, you should be able to:

- Generate and maintain a master production schedule
- Display a master production schedule
- Print a master production schedule exception report

Master Production Schedule Generation Selection

Use this option to create a new MPS plan or to modify an existing plan. You cannot include raw materials on a MPS plan.

Use the menu path below.

- *Master Production Scheduling*
  - *MPS Generation Selection* [MPSGS]

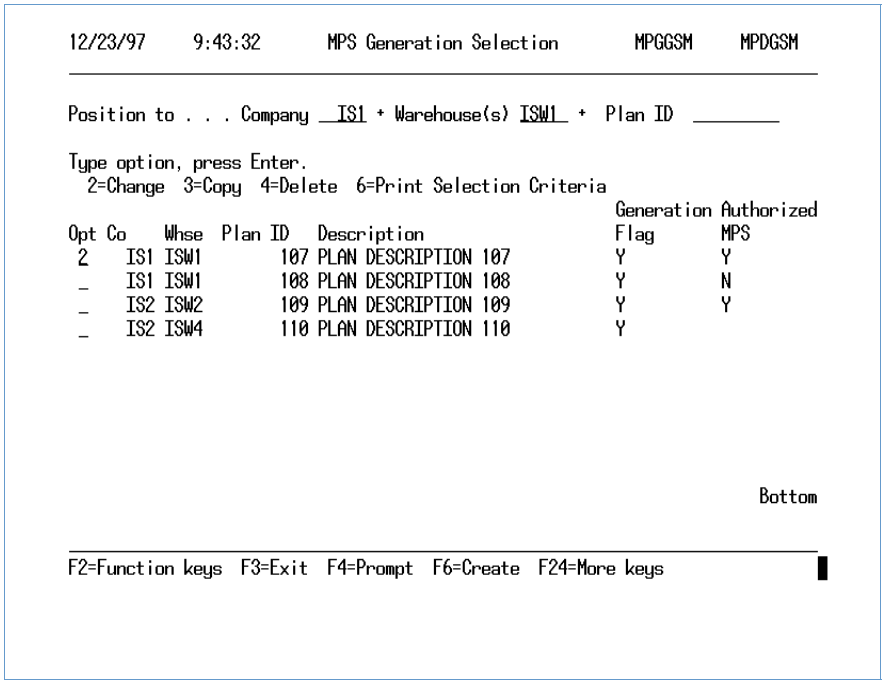


Figure 3-1: MPS Generation Selection screen 1

To define a new set of MPS selection criteria, complete the *Company* and *Warehouse* fields and press F6. The system automatically assigns the Plan ID by adding 1 to the value stored in the *Last Plan Number Assigned* field in the Infinium MP Warehouse, Company, or Entity Control file.

Create a plan with multiple warehouses by pressing F4 with the cursor positioned in the *Warehouse* field. Select the warehouse to include in the plan from the MPS Generation selection screen 1. If you specify multiple warehouses, you must identify the controlling warehouse at the top of the MPS Generation selection screen 2.

Type **2** beside an existing plan and press Enter to go to the MPS Generation Selection screen 2.

If you type **6** beside an existing plan and press Enter, plan selection criteria prints.

If there is a **Y** in the *Generation Flag* field, the plan identified by the company, warehouse, and plan identifier to the left of the flag has been generated.

MPS Generation Specifics

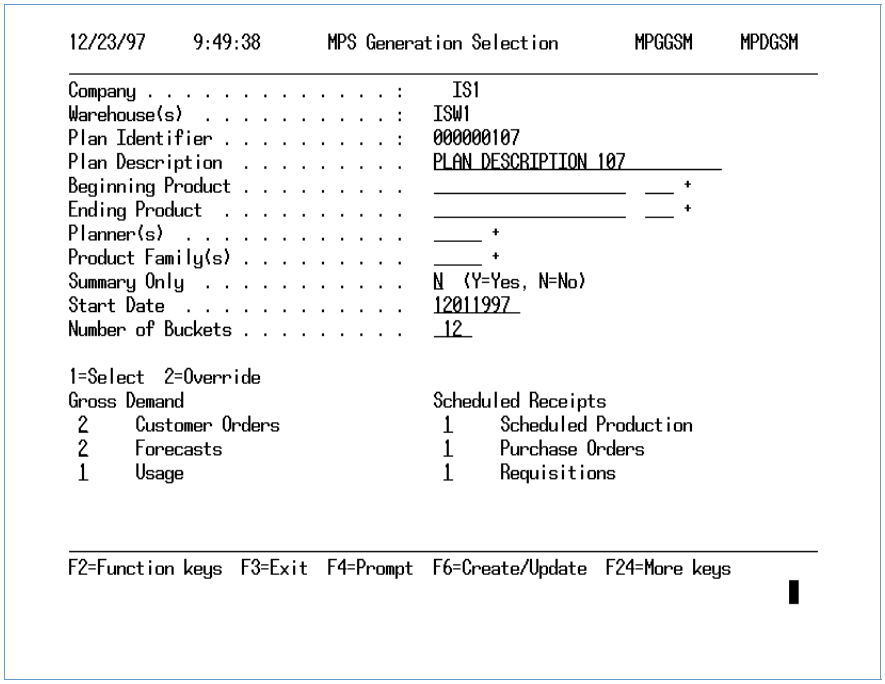


Figure 3-2: MPS Generation Selection screen 2

If you type a product in the *Beginning Product* field and do not type one in the *Ending Product* field, the plan will only be for the one product.

If you select both *Planner(s)* and *Product Family(s)*, both have to match the entries in the Item Warehouse file before the system includes any product in the MPS selection.

Planner(s)

If you type a valid code in this field, the system only selects products with the specified Planner code in the product's Item Warehouse record for the MPS. You can specify more than one planner for the MPS selection by pressing F4 and selecting them. If you select more than one Planner code, the system displays **More..** to the right of this field.

To remove a single selection, field exit through the *Planner(s)* field. To remove multiple selections, you must prompt on the *Planner(s)* field and deselect the codes you wish to remove.

Product Family(s)
If you type a valid code in this field, the system only selects products with the Product Family code in the product's Item Warehouse record for the MPS. You can specify more than one product family for the MPS selection by pressing F4 and selecting them. If you select more than one Product Family code, the system displays **More..** to the right of this field.

To remove a single selection, field exit through the *Product Family(s)* field. To remove multiple selections, you must prompt on the *Product Family(s)* field and deselect the codes you wish to remove.

Summary Only
If you type **N** in this field, the system adds to the summary total, for each product on the MPS, the order detail from:

- Infinium OP
- Infinium PM
- Infinium MC
- Manual Forecasts created in Infinium MP

If you type **Y** in the *Summary Only* field you do not create plan detail. This detail will not be accessible for any reports or inquiries based on this plan. This plan will also not be available in the Demand Fulfillment Workbench. You have to regenerate the plan with an **N** in the *Summary Only* field in order to create detailed data.

Number of Buckets
The number you type in this field cannot exceed the number of buckets in the time bucket definition the system uses for this plan.

Gross Demand, Scheduled Receipts
Use the fields at the bottom of the screen to accept or override selections made in the *Work with Order Type Defaults* option. Type **1** beside the type of demand and receipt to include. The system uses the default order types specified in the *Work with Order Type Defaults* option.

To override the default order types, type **2** in the field to the left of the type you wish to override and press Enter. The system displays the window shown below containing the valid order types for each of the gross demands and scheduled receipts you select. The overrides stay in place for this plan.

The system uses the date you type in the *Start Date* field on the MPS Generation selection screen 2 as the date of the first time bucket.

MPS Order Type Selections

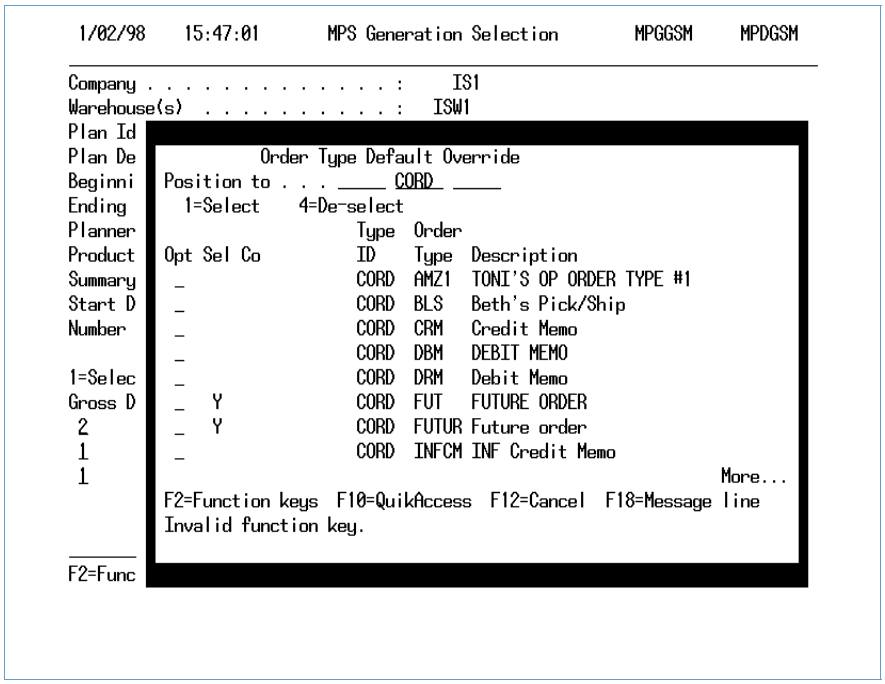


Figure 3-3: Order Type Default Override Window

Type **1** in the *Opt* field to the left of each order type you want to use for this MPS generation and press Enter. Type **4** to exclude any previously selected order types. Your selections pertain to this MPS run only and do not change the permanent settings.

Press Enter to save your changes and close the window.

You have two options for completing the selection process:

- Press F6 (Create/Update). In this case, the system saves your changes to the MPS selection criteria to use the next time you generate the MPS.
- Press F8 (Generate). This option saves the changes you have made and generates a new MPS. In addition, you must specify the time bucket identifier to use for this MPS generation. If you must regenerate a plan, be aware that the system replaces the data for the original plan when you regenerate a plan.

MPS Time Bucket Selection

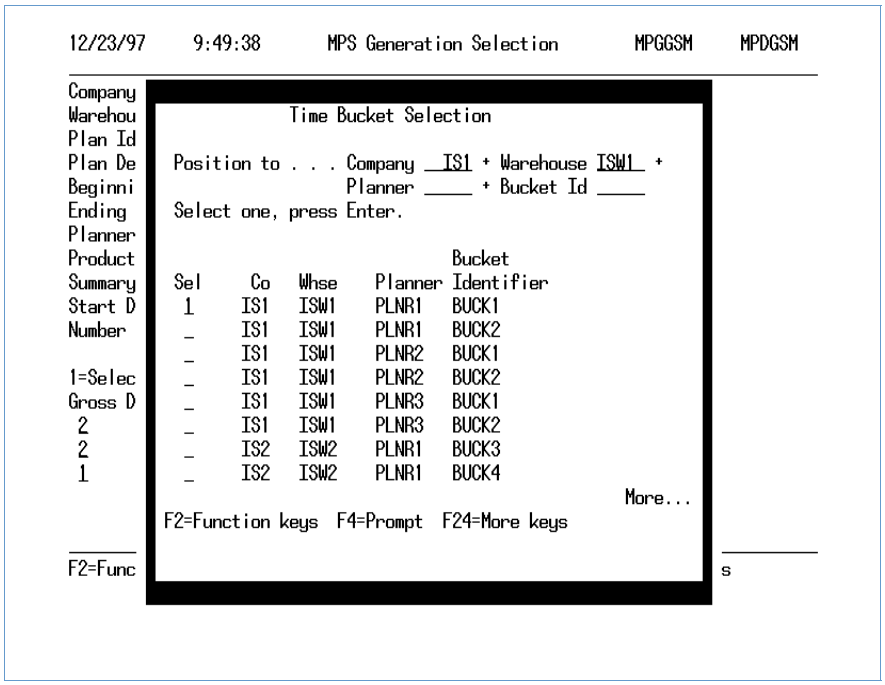


Figure 3-4: Time Bucket Selection window 1

Type any character in the *Sel* field to select the time bucket identifier you want the system to use in the MPS generation process. You must select a time bucket every time you generate a plan.

After making your selection, press Enter. The system then displays the second Time Bucket Selection Window.

Overriding Time Buckets

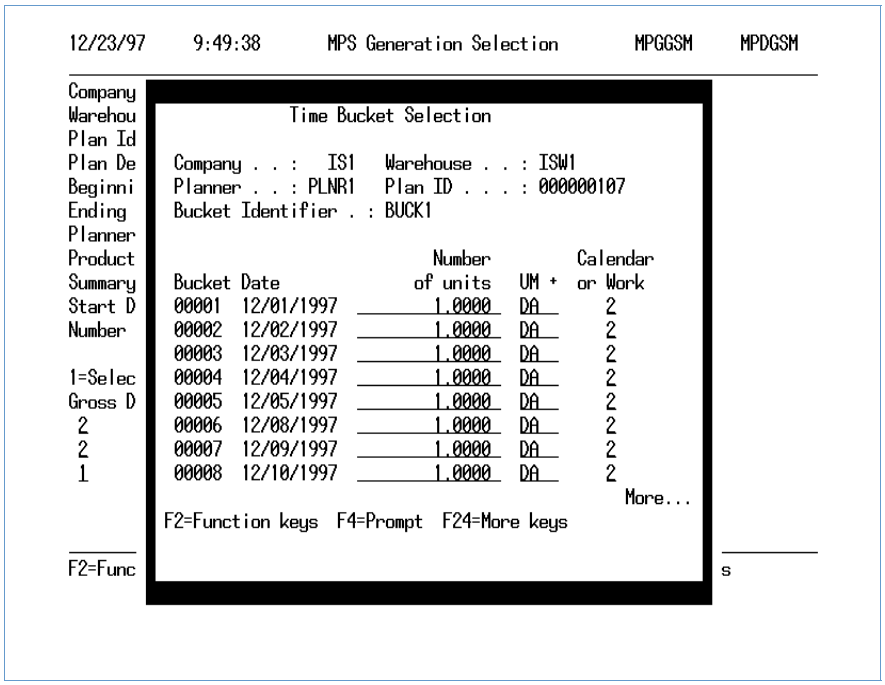


Figure 3-5: Time Bucket Selection window 2

You can override any of the default information. The changes you make are for this MPS run only.

Press F8 to access the Print Selection window.

Print Selections

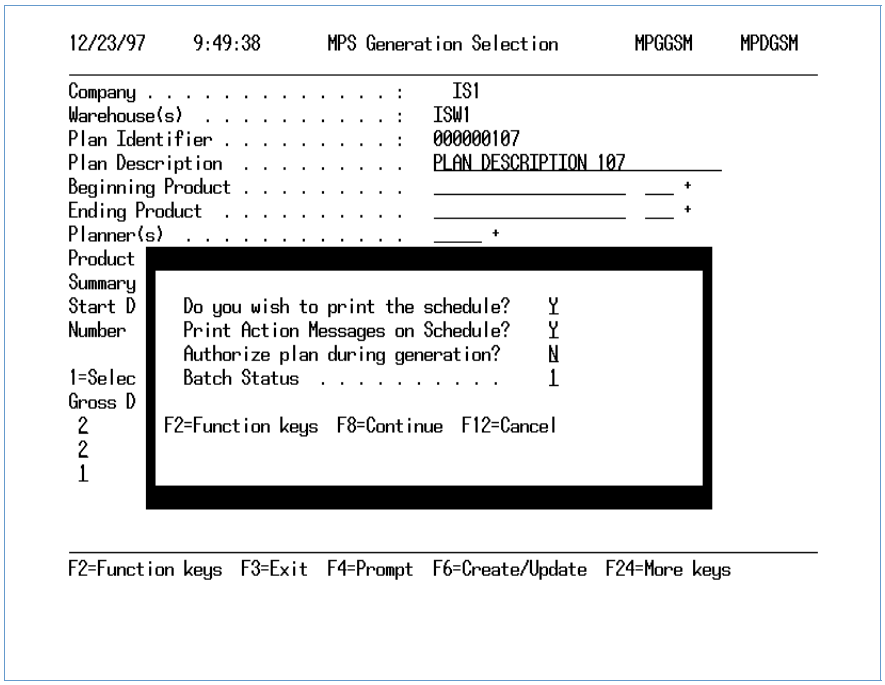


Figure 3-6: Print Selection window

To print, type **Y** in either of the first two fields and press F8 to process.

The *Authorize plan during generation?* field defaults to **N**. If you type **Y**, you can automatically create purchase requisitions or manufacturing batches while you generate the plan. This field combines plan generation and authorization into one step and allows the user to have the system automatically create requisitions or batches during the plan's generation.

If the *Authorize plan during generation?* field is **Y**, the system searches for any item on this MPS in the Item Warehouse file with an *Automatic Creation Method* field value of **1**. If such items exist, when you generate the plan the system creates either a single line item on an Infinium PM requisition for each item or a batch in Infinium MC. The system uses the suggested MPS quantity.

If you use automatic requisition creation and the system finds a suggested quantity of **0**, it does not create a requisition line item.

In addition, if the *Authorize plan during generation?* field is **Y** and lot control is enabled, the system creates a lot number when the plan is generated. If your controls are set up to assign the lot number based on the manufacturing batch number, the manufacturing batch number is used as the lot identifier. If your controls are set up to automatically generate a lot number, the system assigns the next available lot number for the lot identifier.

The *Batch Status* field determines the stage of the batch that Infinium MP automatically creates. Batches can be **0** for Firm Planned, **1** for Scheduled, or **2** for

Work in Process. The system defaults a value in this field from the Infinium MP Entity Control file.

Authorizing the Master Schedule

Use this option after you create and review the MPS plan. You must authorize the plan before you can maintain it using the *Maintain MPS* option. Authorization permits you to create requisitions and batches for production planning. If you do not schedule batches or create purchase requisitions using this option, you do not need to authorize the plan.

Use the menu path below.

- *Master Production Scheduling*
  - *Master Schedule Authorization* [MSA]

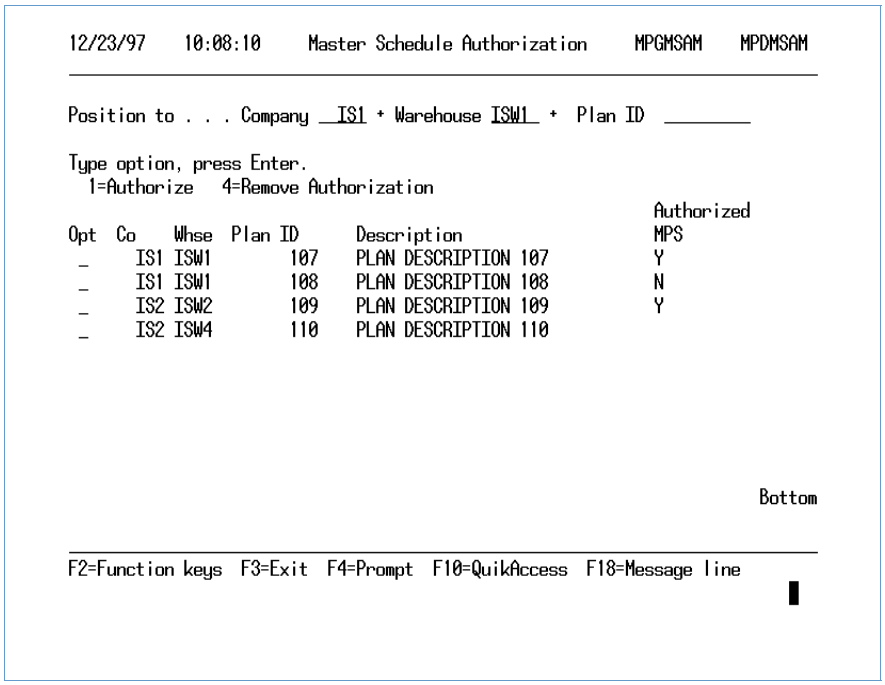


Figure 3-7: Master Schedule Authorization screen

When you regenerate a plan, the system removes the authorization and you must reauthorize the plan prior to additional maintenance.

You can authorize only one plan per company.

If lot control is enabled and you create a batch through this function, the system creates the lot number when the batch is created. If your controls are set up to assign the lot number based on the manufacturing batch number, the Plan ID is used as the

lot identifier. If your controls are set up to automatically generate a lot number, the system assigns the next available lot number for the lot identifier.

Maintaining the Master Production Schedule

This option displays, by product or formula, the requirements identified by the generation of the MPS. You can also create production orders in Infinium MC and purchase requisitions in Infinium PM.

Use the menu path below.

- *Master Production Scheduling*
  - *Maintain MPS* [MMPS]

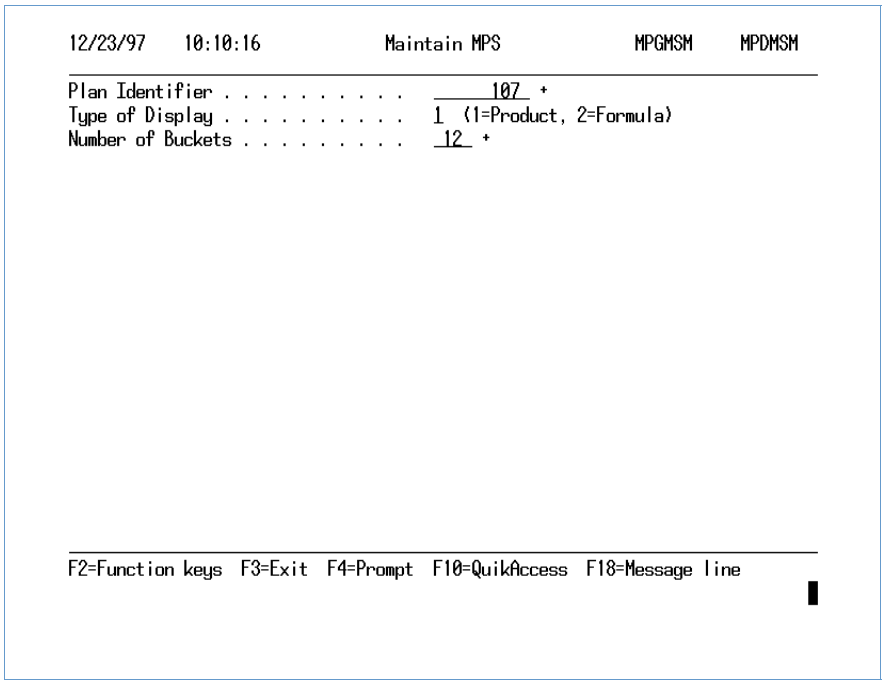


Figure 3-8: Maintain MPS prompt screen

Press F4 on the *Plan Identifier* field for the system to display a list of all authorized plans from which to choose. The *Number of Buckets* field automatically fills in, but you can override it with a number that is less than the total buckets allowed for that plan.

MPS Selection Screen

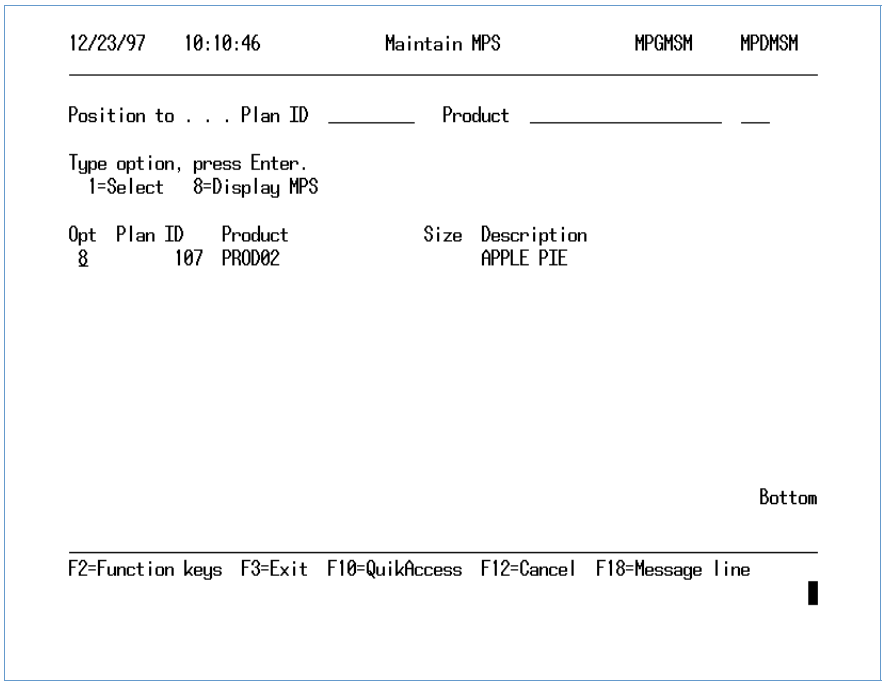


Figure 3-9: Maintain MPS selection screen

If you chose product as the type of display, the system displays each product included in the MPS. If you chose formula, the system displays all formulas required by the MPS. Where there are multiple products made from the same formula, the system combines individual quantities and breaks out the individual products when you schedule the batch or create a purchase requisition.

Type **8** in the *Opt* field to display the MPS for a product. The display screens are shown on the next two pages. Type **1** in the *Opt* field to maintain the MPS for the product or formula.

Displaying MPS Data

The screen below displays when you type **8** next to a Plan ID and press Enter from the Maintain MPS selection screen.

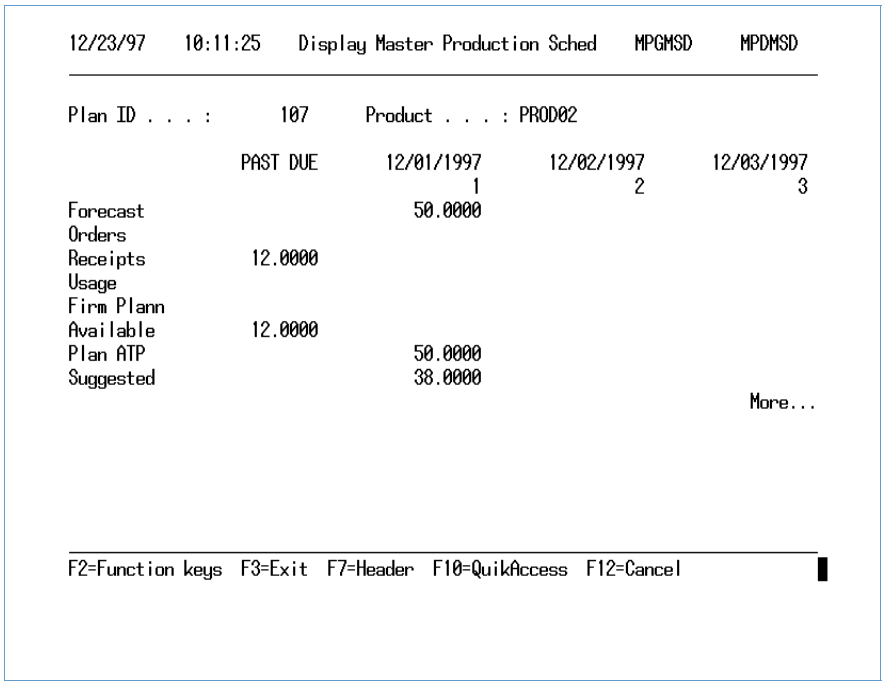


Figure 3-10: Display Master Production Sched screen

The system displays the summary portion of the MPS. Use the PgUp and PgDn keys to move the screen to display the remaining time buckets.

The system displays the MPS header screen when you press F7.

Press Help or F1 on the row headings to view an explanation of how the system calculates each category of information. Refer to the “Calculations” appendix for more information.

MPS Detail

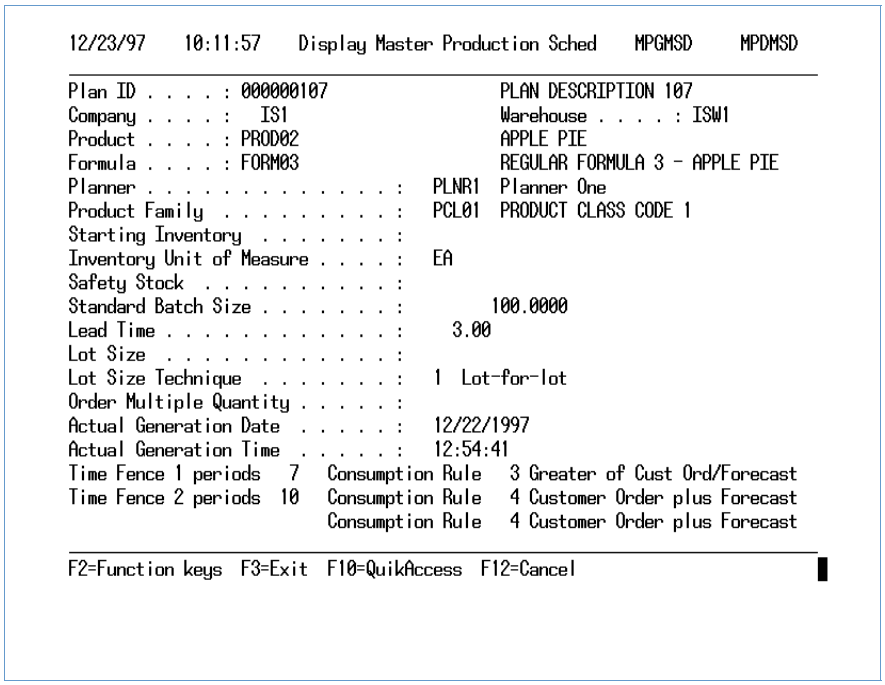


Figure 3-11: MPS header screen

This screen shows the controls used in generating the MPS displayed above.

Maintaining a MPS

The system displays this screen when you type **1** in the *Opt* field on the MPS selection screen.

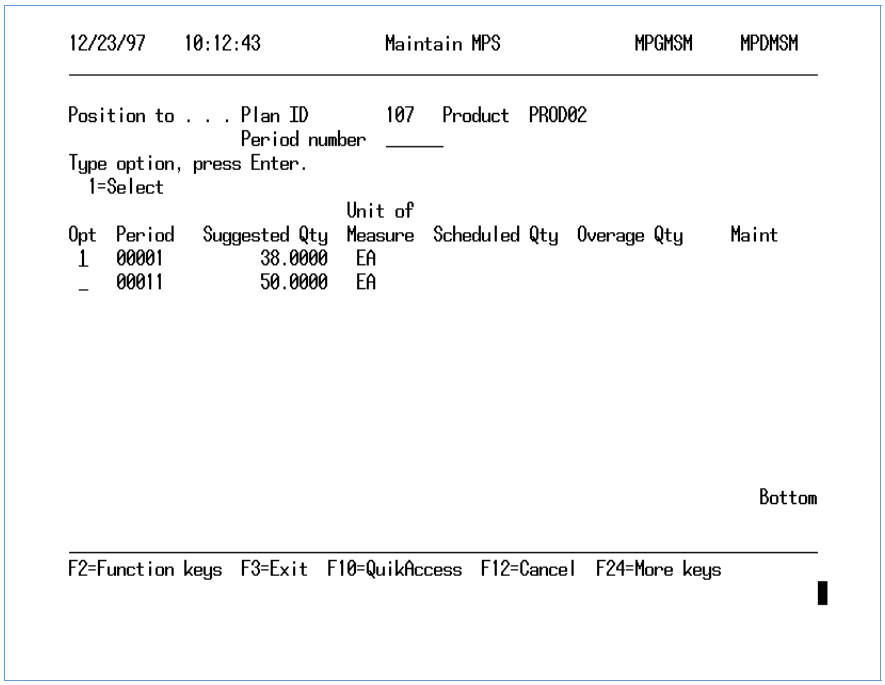


Figure 3-12: Schedule Batches/Create Requisitions selection screen

Type **1** in the *Opt* field to work with a suggested quantity; then press F13 (Schedule Batch) to schedule a batch in Infinium MC for manufactured products or F14 (Create Reqs) to create a requisition in Infinium PM for purchased products.

If you are working with a formula used to make multiple products, the suggested quantity is sufficient to meet the needs for all product requirements. The batch the system creates is for the suggested quantity with the fill instructions set to the products and quantities calculated by the MPS.

If you are working with a purchased product, the system displays the Requisition Creation screen when you press F14.

If you are working with a formula, the system displays the Batch Creation screen when you press F13.

You can create a requisition for manufactured products, and a purchased product can have a batch created for it as long as a formula is attached to the product record. Access products through the *Work with Products* option in either Infinium CA or Infinium PF.

A **Y** in the *Maint* column indicates that an item has had a requisition or a batch created for it, and this item is no longer available for maintenance.

You cannot continue to the Requisition Creation or Batch Creation screens unless you are using Infinium PM or Infinium MC.

Creating Requisitions

The system displays this screen when you press F14 on the Schedule Batches/Create Requisitions selection screen.

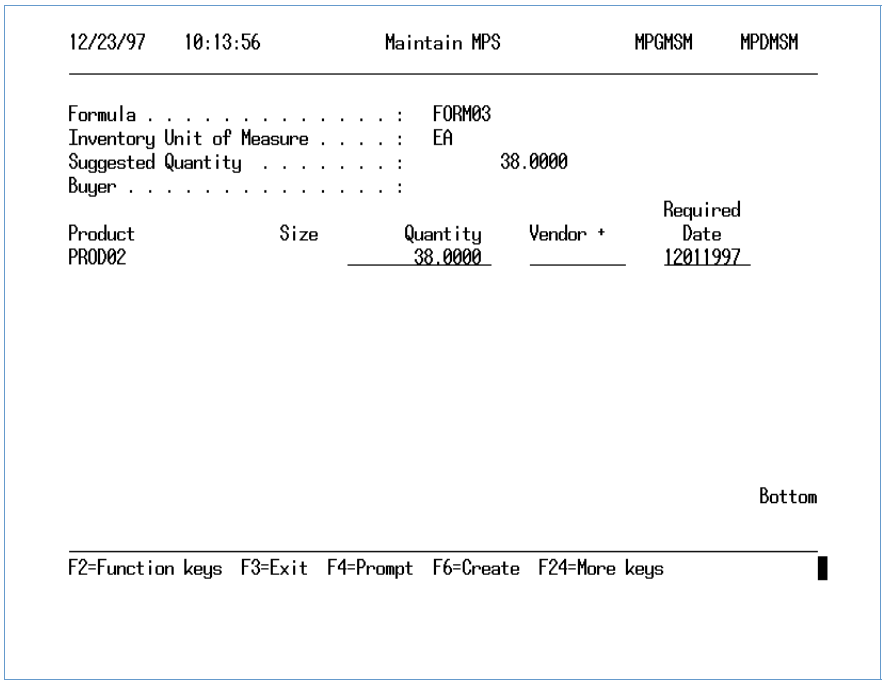


Figure 3-13: Requisition Creation screen

Quantity
The system defaults the MPS quantity into this field. You can override this quantity.

Vendor
This field defaults from the Item Warehouse file *Primary Vendor* field in Infinium IC.

If in the Item Warehouse file a sole vendor exists for an item, you must remain with that vendor in this option. You will not be able to override the Vendor code.

Required Date
This required field defaults to the system date. You can override this date if needed.

Press F6 to create the purchase requisitions. The system creates requisitions that have a requisition type of APS.

Before you can create requisitions, you must create a special requisition type control in Infinium PM as follows:

- Type **APS** in the *Requisition Type* field.
- Type **P** in the *Requisition code* field (on the Requisition Type header screen).

- Type **1** in the *Generation of Req #* field (on the Requisition Type header screen).
- Fill in the remaining fields as appropriate.
- The advanced planning user must have authorization in Infinium PM to create requisitions.

Creating Batches

The system displays this screen when you press F13 on the Schedule Batches/Create Requisitions selection screen.

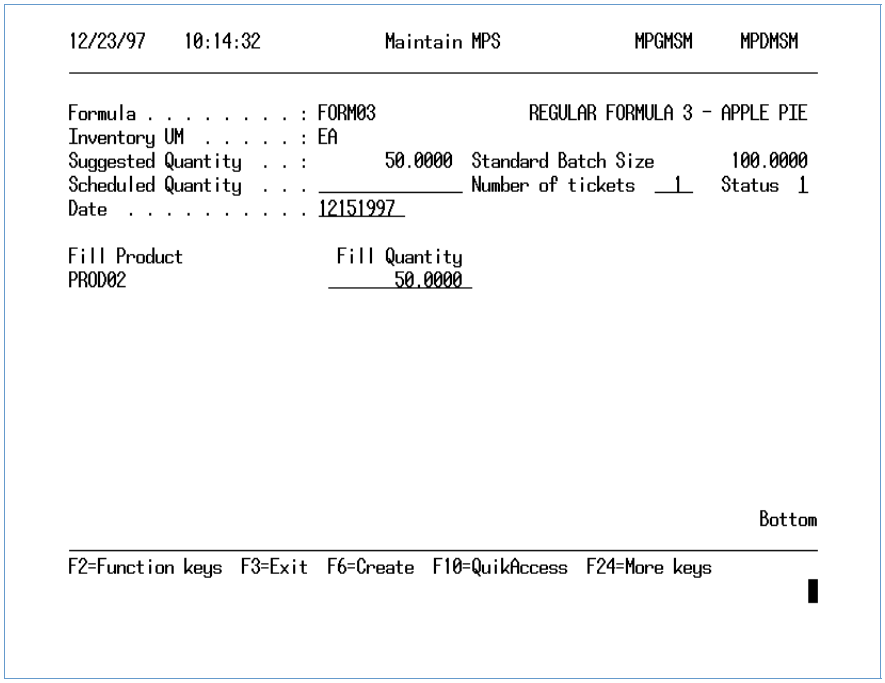


Figure 3-14: Batch Creation screen

Formula

If you have multiple instances of a formula, the system displays the instance of the formula used. If the plan has multiple warehouses, the system uses the controlling warehouse when searching the formula hierarchy to obtain the instance of the formula.

Scheduled Quantity

Type a quantity equal to the batch size you want to create in this field.

Number of tickets

To create multiple batches of the size you indicated in the *Schedule Quantity* field, type the number of batches in the *Number of Tickets* field. The system creates that

number of batches of the same quantity, with each batch having its own unique batch number.

Status
Using this field, you can assign the following initial codes:

- **0** Firm Planned
- **1** Scheduled
- **2** Work in Process

Remember you can use the Demand Fulfillment Workbench to work with MPS inventory problems.

If lot control is enabled and you create a batch through this function, the system creates a lot number when the plan is generated. If your controls are set up to assign the lot number based on the manufacturing batch number, the *Plan ID* is used as the lot identifier. If your controls are set up to automatically generate a lot number, the system assigns the next available lot number for the lot identifier.

Displaying the Master Production Schedule

Use this option to display the MPS summary information for a product or material.

Use the menu path below.

- *Master Production Scheduling*
  - *Display Master Production Sched* [DMPS]

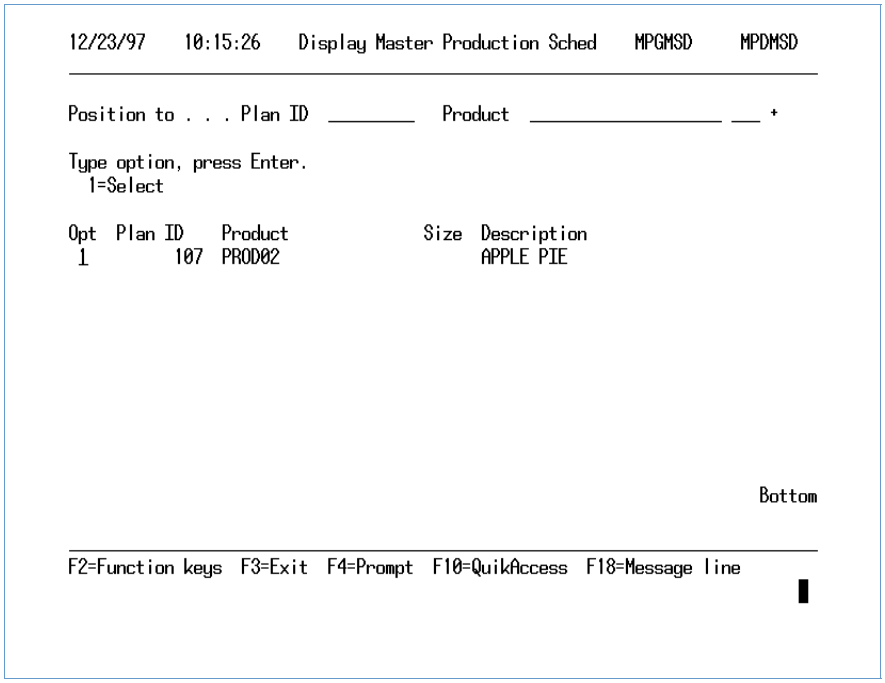


Figure 3-15: Display Master Production Sched selection screen

Type **1** in the *Opt* field and press Enter to display the MPS for a product or material.

Reposition the selection list by typing all or part of a Plan ID or Product and press Enter. The system redisplays the selection list beginning as close to your entry as possible.

MPS Summary

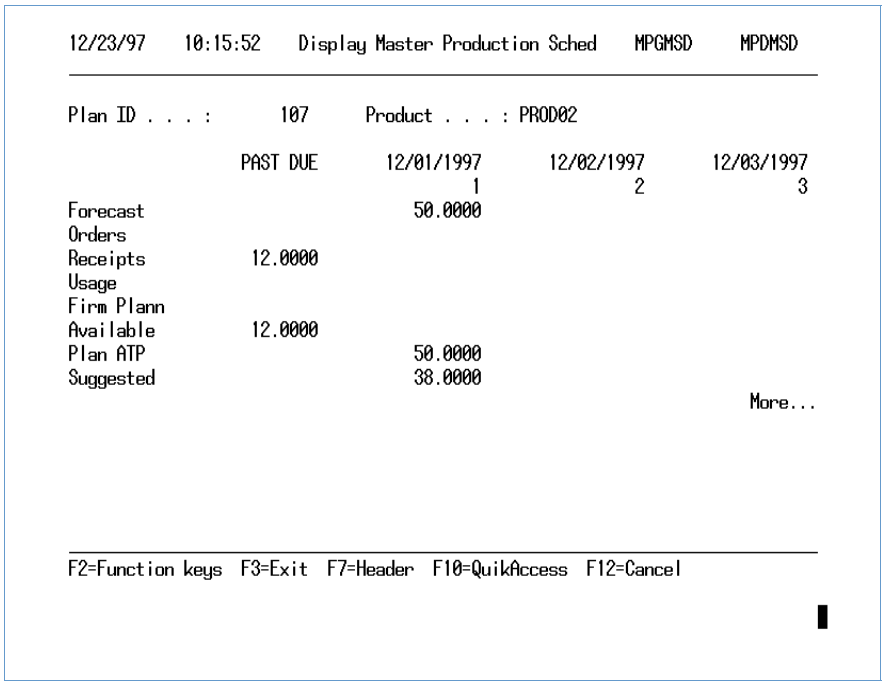


Figure 3-16: Display Master Production Sched summary screen

The system displays the summary portion of the MPS. Use the PgUp and PgDn keys to move the screen to display the remaining time buckets.

The system displays the MPS header screen when you press F7.

Press Help or F1 on the row headings to view an explanation of how the system calculates each category of information. Refer to the “Calculations” appendix for more information.

MPS Detail Information

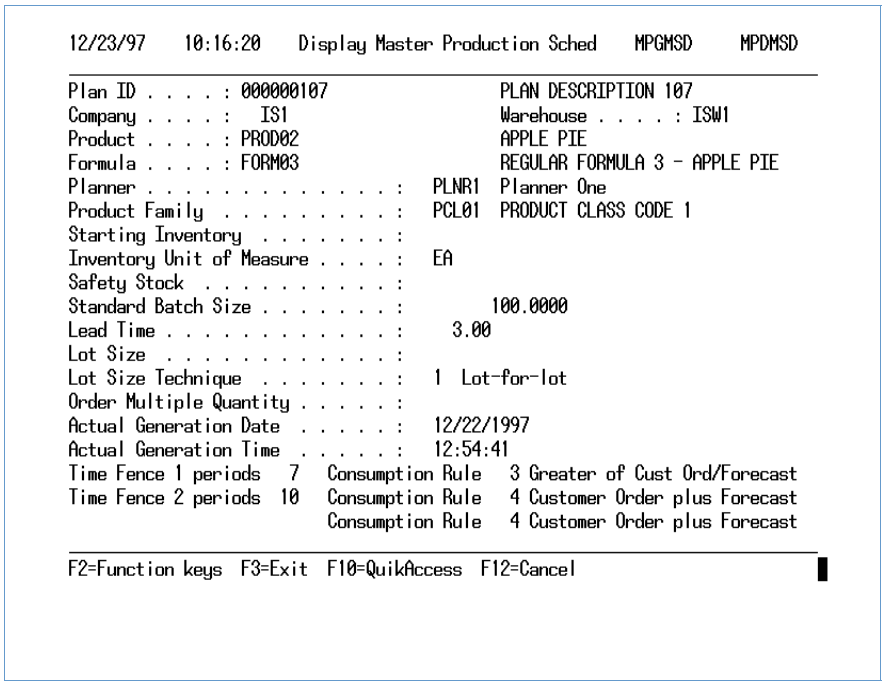


Figure 3-17: MPS header screen

This screen shows the controls and parameters used in generating the MPS shown on the previous page.

Printing the MPS Exception Report

Use this option to create exception reporting on MPS plans previously generated using the *MPS Generation Selection* option discussed earlier in this part.

Use the menu path below.

- *Master Production Scheduling*
  - *MPS Exception Reporting* [MPSER]

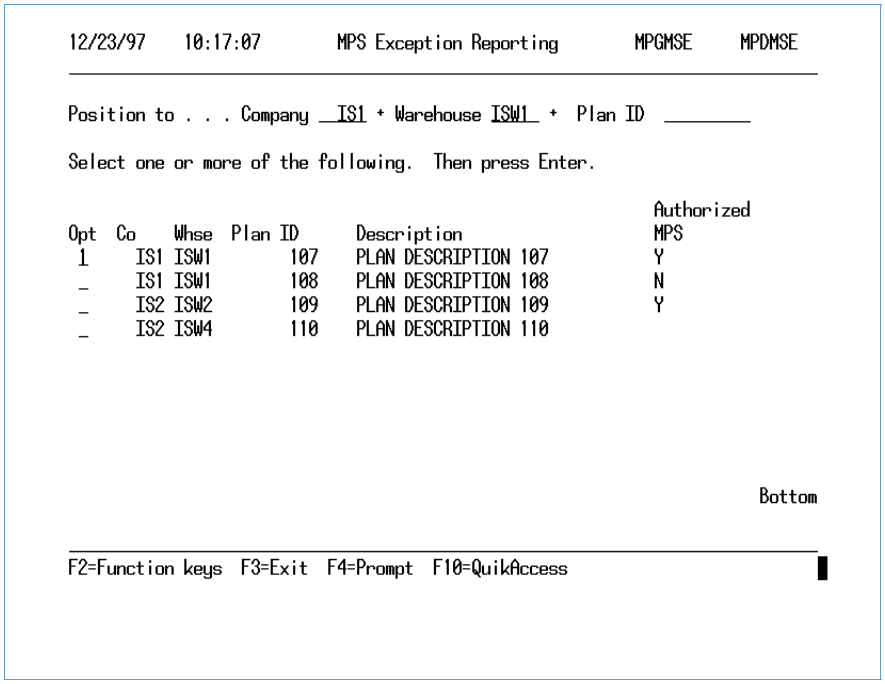


Figure 3-18: MPS Exception Reporting selection screen

Only generated Plan IDs display on this screen.

Type any character in the *Sel* field to select one or more Plan IDs to include on the report. After selecting the plans, press Enter to continue to the next screen.

Exception Reporting

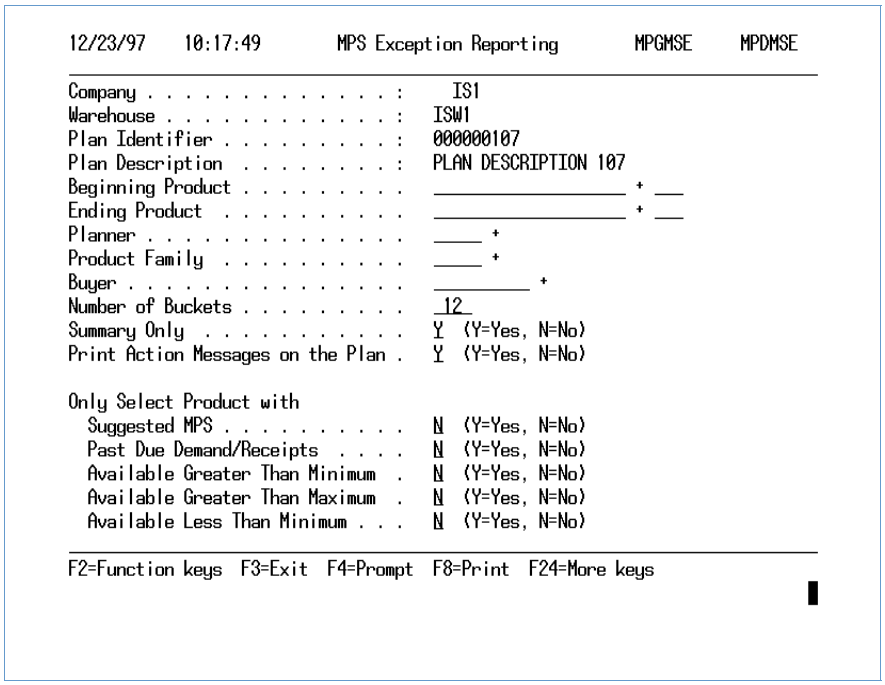


Figure 3-19: MPS Exception Reporting Definition screen

Type the criteria you want to use in generating this report in the fields above.

Under the heading Only Select Product with, select one or more options.

Press F11 to change the display from product selection to formula selection.

Press F8 to generate the report.

Examples of the MPS Exception reports are in the “Infinium MP Reports” appendix.

The MPS Exception report and the Master Production Schedule report refer to the same listing.

Notes

Part 4
Material Requirements Planning

4

The part consists of the following topics:

Overview of Working with Material Requirements Planning

Material Requirements Planning (MRP) consists of options that use the formula/bill of material, inventory data, and Master Production Schedule (MPS) to calculate requirements for materials. The system makes recommendations to release replenishment orders for material and to reschedule open orders when due dates and need dates are not in phase.

Time-phased MRP begins with the list of items on the MPS. It determines the quantity of all components and the materials required to produce them and the dates on which you require the components and materials. The system explodes the formula/bill of material, adjusting for inventory quantities on hand or on order, and offsets the net requirements by the appropriate lead times.

After you complete this part, you should be able to:

- Generate and maintain the material requirements plan
- Display material requirements
- Print a material requirements exception report

Working with MRP Generation Selection

Use this option to generate the Material Requirements Plan.

Use the menu path below.

- *Material Requirements Planning*
  - *MRP Generation Selection* [MRPGS]

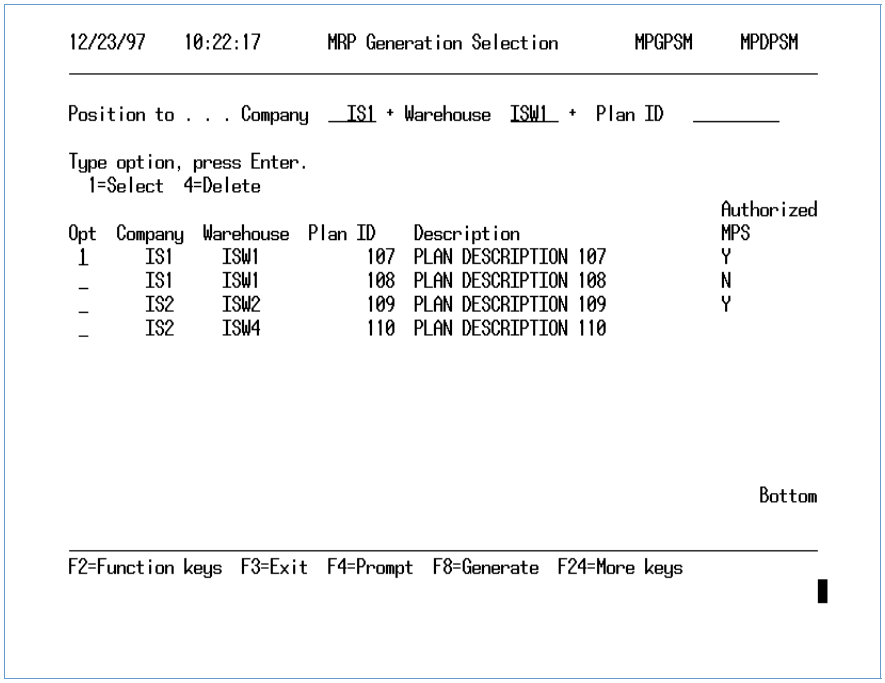


Figure 4-1: MRP Generation selection screen

To generate an MRP, type **1** in the *Opt* field next to the plan you want to process and press F8.

MRP Generation Specifics

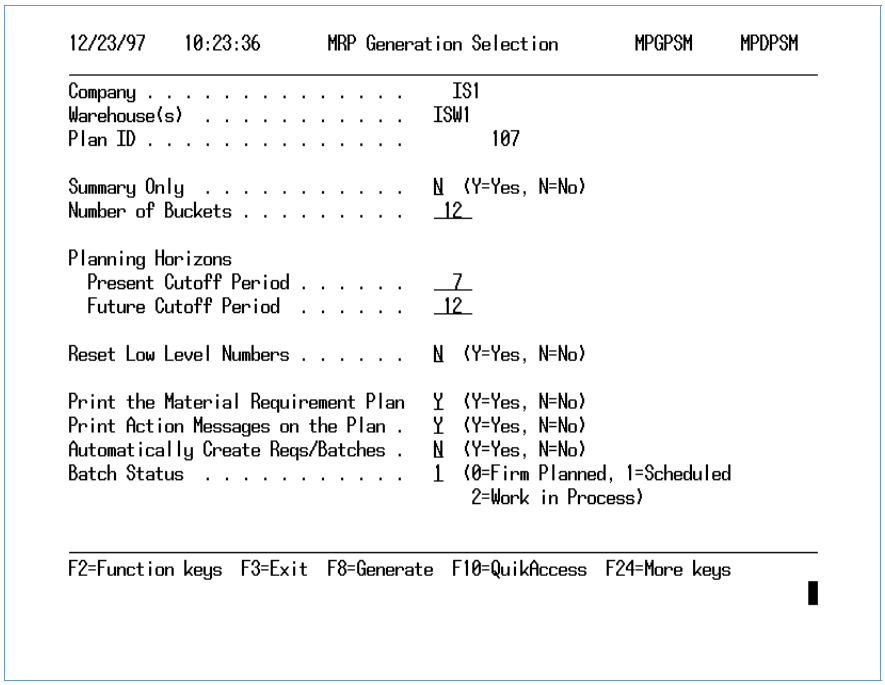


Figure 4-2: MRP Generation Definition screen

The value you type in the *Number of Buckets* field determines the number of time periods the system includes in the MRP.

The Planning Horizons fields determine the requirements obtained from the Master Production Schedule (MPS).

Present Cutoff Period
Each period up to and including the period you type in this field includes the firm planned order quantities for the material requirements in the MRP.

Future Cutoff Period
Each period beginning with the first period after the present cutoff period and continuing through the period you type in this field includes the firm planned order quantities and the suggested MPS quantities for the material's requirements in the MRP.

Any time buckets after the future cutoff period do not include the requirements from the MPS.

Reset Low Level Numbers
Type **Y** in this field for the system to reset the Low Level codes for the formulas included in the MPS plan. This does not affect formulas not included in the selected plan.

If you type **Y** in the *Summary Only* field you do not create plan detail. This detail will not be accessible for any reports or inquiries based on this plan. This plan will also

not be available for the Demand Fulfillment Workbench. You have to regenerate the plan with an **N** in the *Summary Only* field in order to create detailed data.

Automatically Create Reqs/Batches

The *Automatically Create Reqs/Batches* field defaults to **N**. If you type **Y** in this field, you can automatically create purchase requisitions and manufacturing batches while you generate the plan.

If the *Automatically Create Reqs/Batches* field is **Y**, the system searches for any item on this MRP in the Item Warehouse file with an *Automatic Creation Method* field value of **1**. If such items exist, then when you generate the plan the system creates a purchasing requisition line or a batch for each item. The system uses the suggested MRP quantity.

If you use the automatic requisition creation feature and the system finds a suggested quantity of **0**, the system does not create anything.

The system generates the report after you press F8. The report is at the summary level.

Press F8 to generate a MRP plan.

If you regenerate a plan, the system displays a warning message indicating that this plan was previously generated. If you continue to generate the plan, the system deletes all of the information from the prior plan run and creates a new plan. Press F21 to override the warning and continue with the generation.

Maintaining the MRP

Use this option to display or work with the MRP. You can create batches in Infinium MC or purchase requisitions in Infinium PM.

Use the menu path below.

- *Material Requirements Planning*
  - *Maintain MRP* [MMRP]

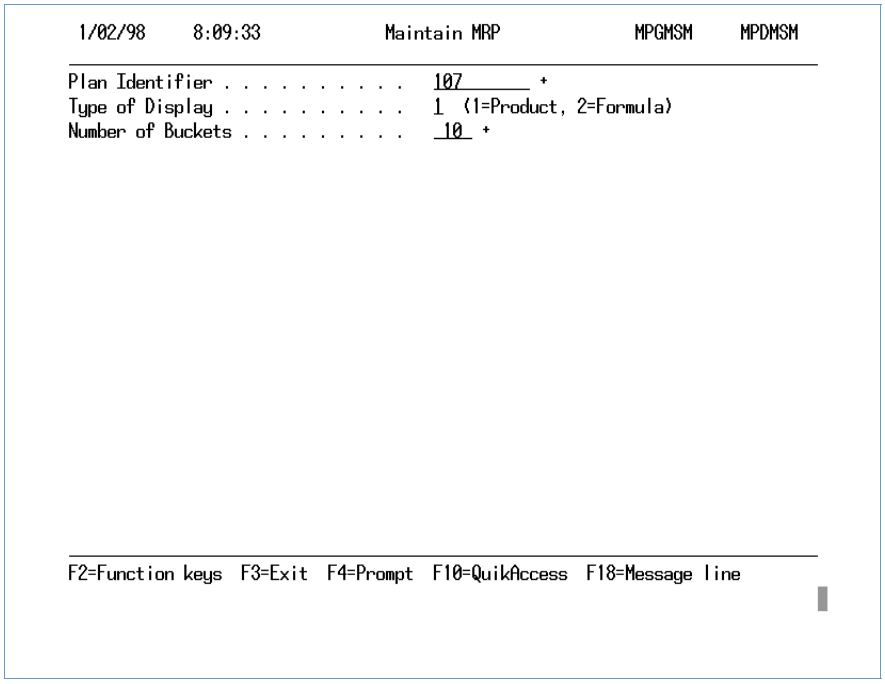


Figure 4-3: Maintain MRP prompt screen

Type the identifier in the *Plan Identifier* field or press F4 to display a list of all authorized plans from which to choose. Only authorized plans are available on the selection screen.

Number of Buckets
Type the number of time periods you want to display or print in this field. This number cannot exceed the number of time buckets defined for the plan identifier.

When you have completed this screen, press Enter to continue.

Product/Formula Selection

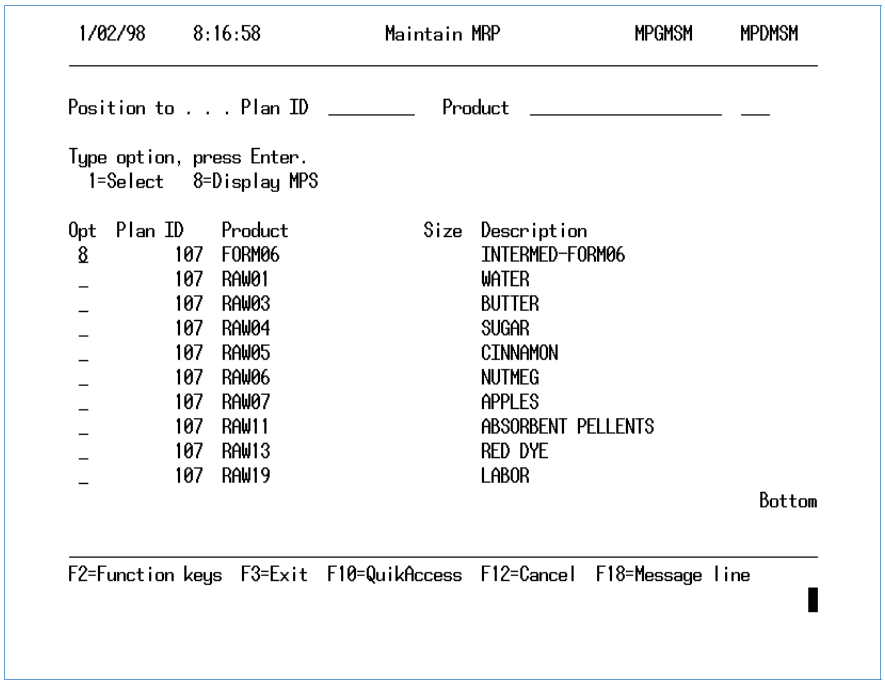


Figure 4-4: Maintain MRP selection screen

If you chose to display by product on the previous screen, the system displays each product included in the MRP.

If you displayed by formula, the system displays all formulas required by the MRP. If you have multiple instances of a formula, the system displays the instance of the formula used. If the plan has multiple warehouses, the system uses the controlling warehouse when searching the formula hierarchy to obtain the instance of the formula.

For multiple products made from the same formula, the system combines individual quantities and breaks them out to individual products at the time you schedule the batch or create a purchase requisition.

To display the MRP, type **8** in the *Opt* field and press Enter. To maintain the MRP, type **1** in the *Opt* field and press Enter.

If a formula is on your MRP, the formula and its ingredients display on the above screen. You can create a batch from the formula. The fill will be the formula itself and the ingredients will be the formula's ingredients.

MRP Summary Information

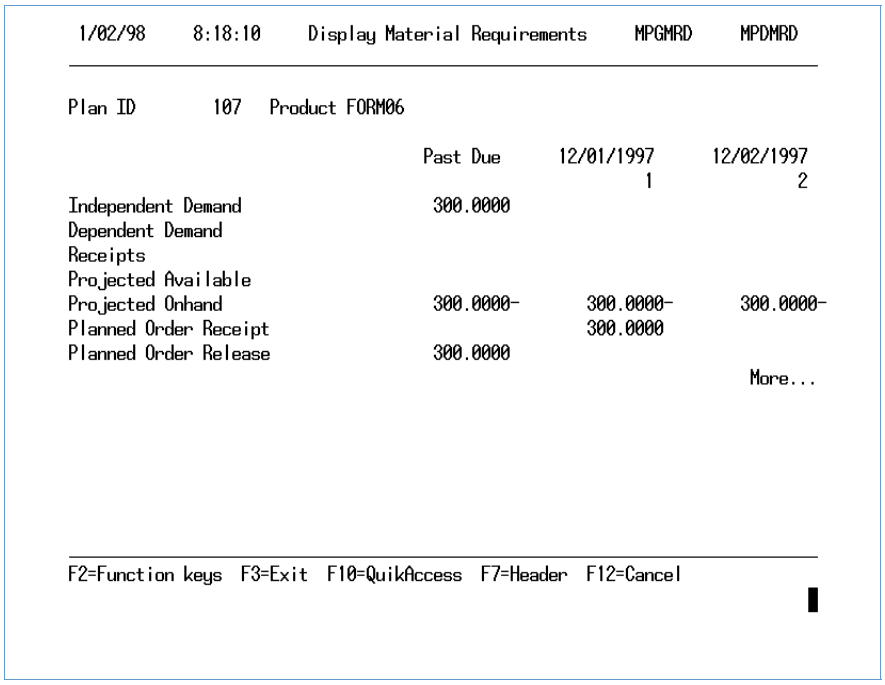


Figure 4-5: Display Material Requirements summary screen

The system displays the summary portion of the MRP. Use the PgUp and PgDn to move the screen to display the remaining time buckets.

The system displays the MRP header screen when you press F7.

Press Help or F1 on the row headings to view an explanation of how the system calculates each category of information. Refer to the “Calculations” appendix for more information.

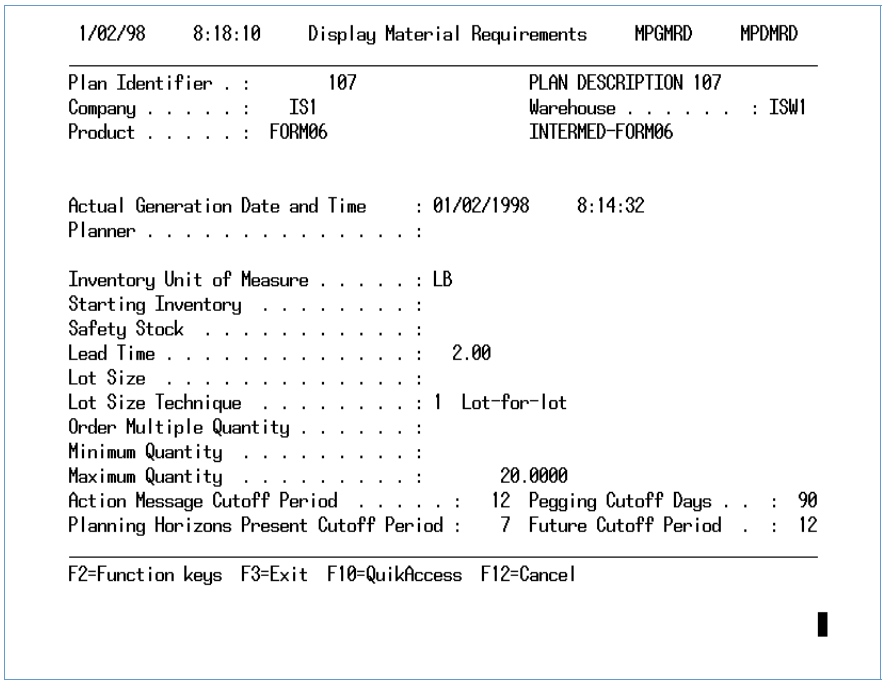


Figure 4-6: MRP header screen

This screen shows the controls and parameters used in generating the MRP summary data.

MRP Detail Information

This screen displays when you press F7 from the Display Material Requirements summary screen.

Batch and Requisition Creation

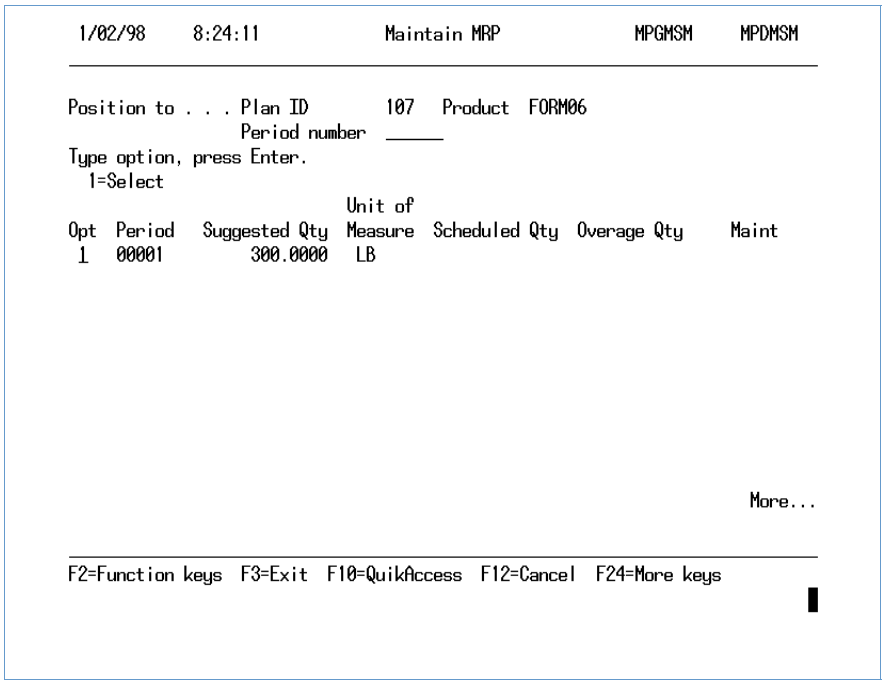


Figure 4-7: Schedule Batches/Create Requisitions selection screen

This is the Schedule Batches/Create Requisitions selection screen. Type **1** in the *Opt* field to work with a suggested quantity. After selecting, press F13 (Schedule Batch) to schedule a batch in Infinium MC or F14 (Create Reqs) to create a requisition in Infinium PM.

If you are working with a formula used to make multiple products, the suggested quantity is sufficient to meet the needs for all product requirements. The batch the system creates is for the suggested quantity with the fill instructions set to the products and quantities calculated by the MRP.

If you are working with a purchased product, the system displays the Requisition Creation screen when you press F14.

If you are working with a manufactured product, the system displays the Batch Creation screen when you press F13.

You cannot continue to the next screen unless you are using Infinium PM or Infinium MC.

Creating Requisitions

The system displays this screen when you press F14 on the Schedule Batches/Create Requisitions selection screen if the selection is a purchased product.

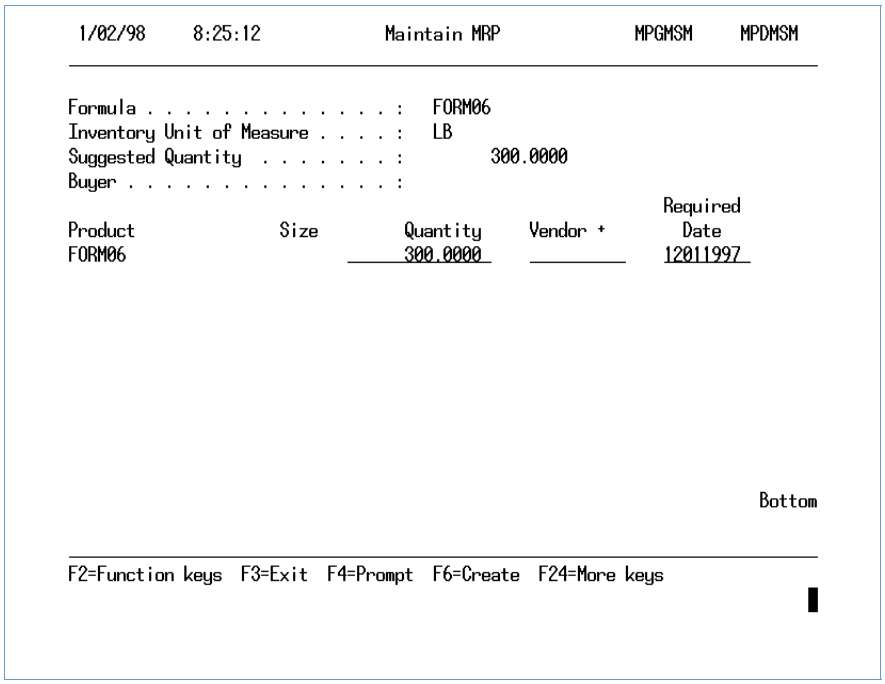


Figure 4-8: Requisition Creation screen

Quantity
The system defaults the MRP quantity into this field. You can override this quantity.

Vendor
This field defaults from the Item Warehouse file *Primary Vendor* field in Infinium IC.

If in the Item Warehouse file a sole vendor exists for an item, you must remain with that vendor in this option. You will not be able to override the Vendor code.

Required Date
This required field defaults to the system date. You can override this date if needed.

Press F6 to create the purchase requisitions. The requisitions the system creates have a requisition type of APS.

Before you can create requisitions, you must create a special requisition type control in Infinium PM as follows:

- Type **APS** in the *Requisition Type* field.
- Type **P** in the *Requisition code* field (on the Requisition Type header screen).
- Type **1** in the *Generation of Req #* field (on the Requisition Type header screen).
- Fill in the remaining fields as you like.
- The Advanced Planning user must have authorization in Infinium PM to create requisitions.

Creating Batches

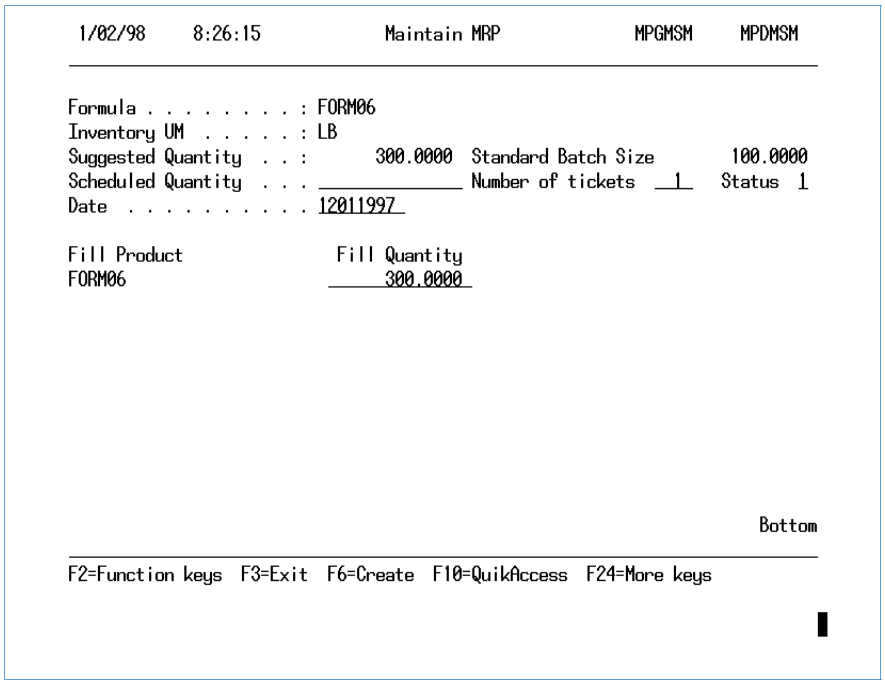


Figure 4-9: Batch Creation screen

If the item you select is a manufactured product the system displays this screen when you press F13 on the Schedule Batches/Create Requisitions selection screen.

Scheduled Quantity
Type a quantity equal to the batch size you want to create in this field.

Number of tickets
To create multiple batches of the size you indicated in the *Schedule Quantity* field, type the number of batches in the *Number of tickets* field. The system creates that number of batches of the same quantity, with each batch having its own unique batch number.

Status
Use this field to assign the following initial Status codes:

0 Firm Planned

1 Scheduled

2 Work in Process

Remember you can use the Demand Fulfillment Workbench to work with MRP inventory problems.

Displaying the Material Requirements Plan

Use this option to display the MRP summary information for a product or material.

Use the menu path below.

- *Material Requirements Planning*
  - *Display Material Requirements* [DMR]

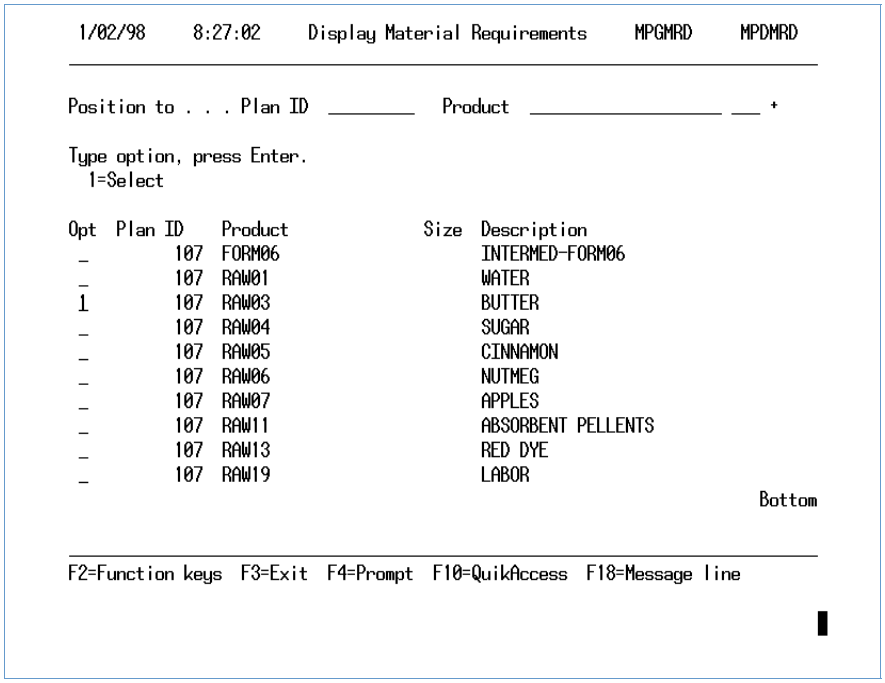


Figure 4-10: Display Material Requirements selection screen

Type **1** in the *Opt* field and press Enter to display the MRP for a product or material.

Reposition the selection list by typing all or part of a Plan ID or Product and press Enter. The system redisplays the selection list beginning as close to your entry as possible.

Displaying MRP Information

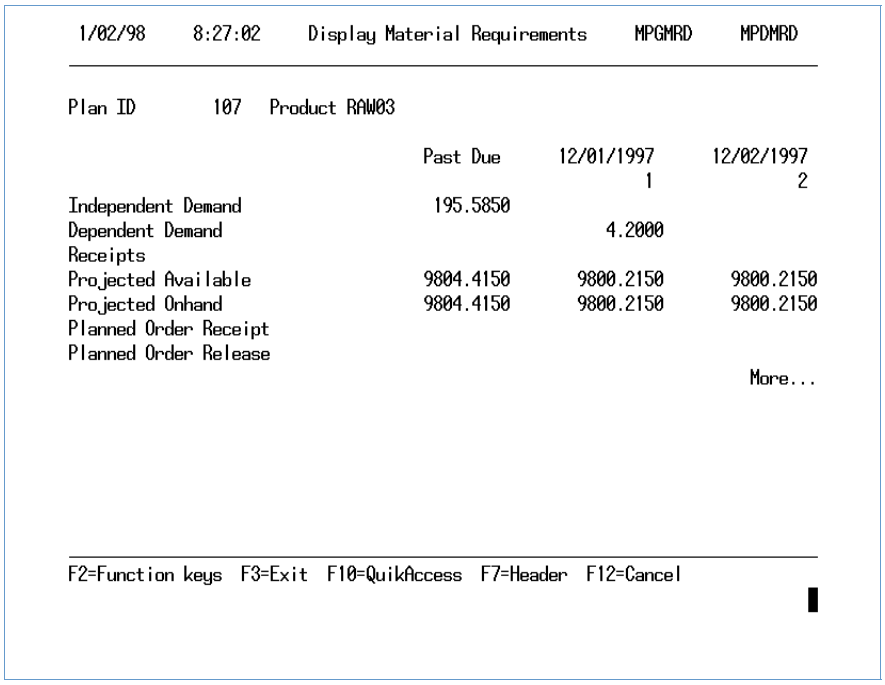


Figure 4-11: Display Material Requirements summary screen

The system displays the summary portion of the MRP. Use the PgUp and PgDn keys to move the screen to display the remaining time buckets.

The system displays the MRP header screen when you press F7.

Press Help or F1 on the row headings to view an explanation of how the system calculates each category of information. Refer to the “Calculations” appendix for more information.

MRP Detail Information

This screen displays when you press F7 on the Display Material Requirements summary screen.

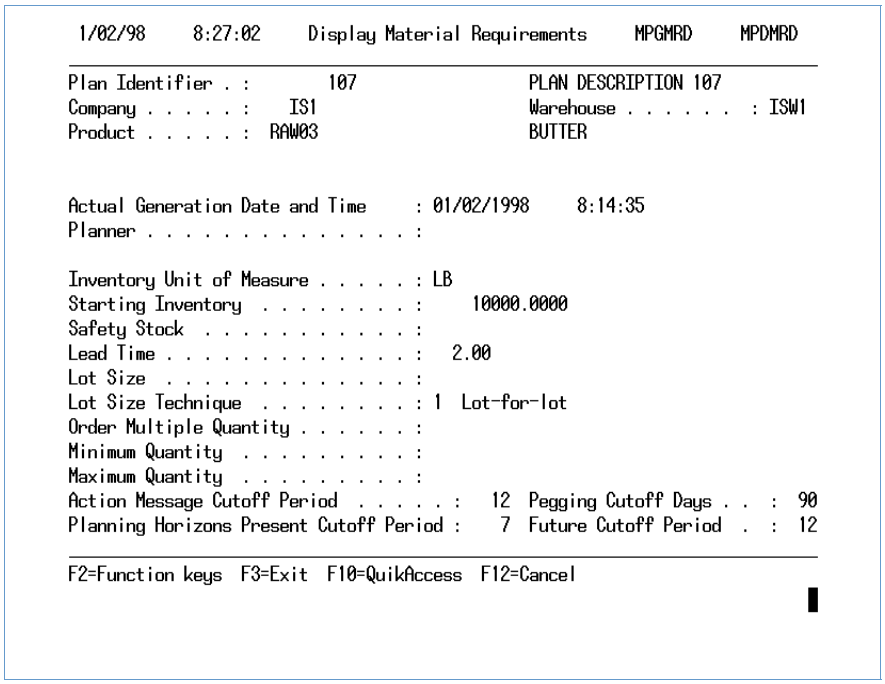


Figure 4-12: MRP header screen

This screen shows the controls and parameters used in generating the MRP shown on the previous page.

Printing the MRP Exception Reports

Use this option to create exception reports on MRPs generated using the *MRP Generation Selection* option discussed earlier in this part.

Use the menu path below.

- *Material Requirements Planning*
  - *MRP Exception Reporting* [MRPER]

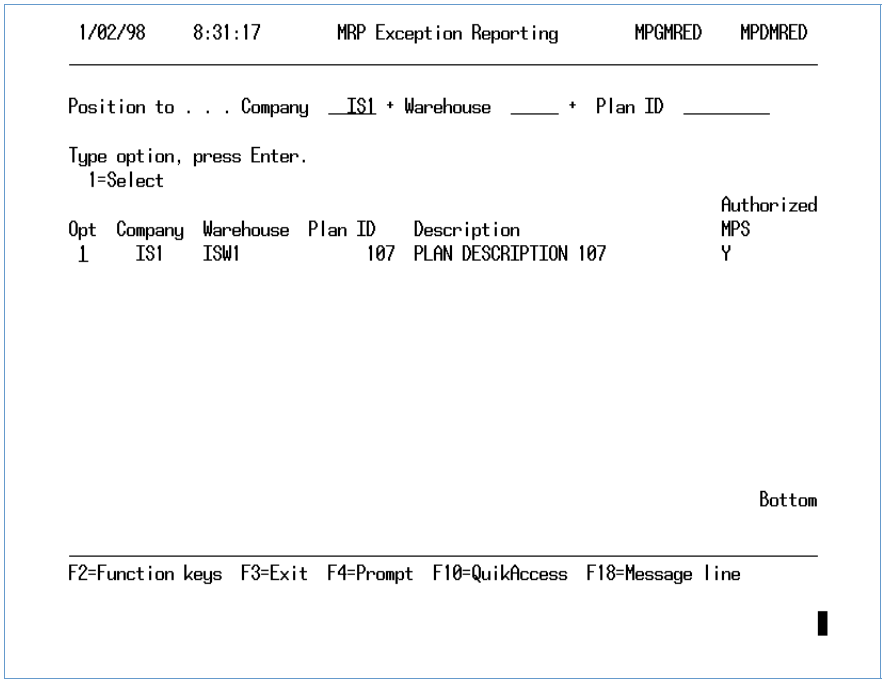


Figure 4-13: MRP Exception Reporting selection screen

Only generated Plan IDs display on this screen. Type any character in the *Opt* field to select one or more Plan IDs to include on the report.

After selecting the plans, press Enter to continue to the MRP Exception Report prompt screen.

Exception Reporting

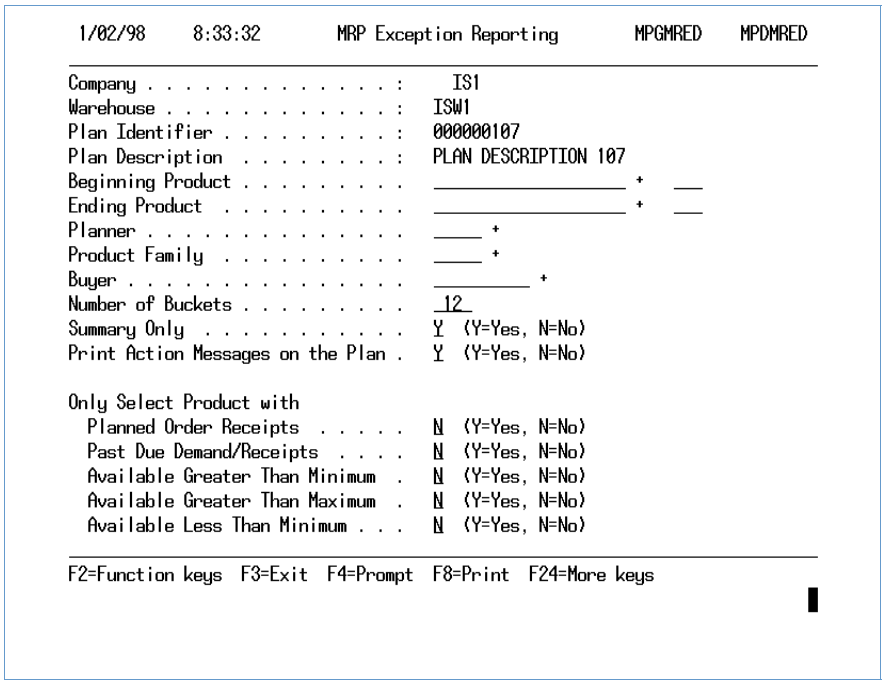


Figure 4-14: MRP Exception Reporting prompt screen

Type the criteria you want to use in generating this report in the fields above.

The system generates the report after you press F8. The report is at the summary level.

Under the column Only Select Product with, select one or more options.

Examples of the MRP Exception report by quantity, production budgeting, and by both are in the “Infinium Advanced Planning Reports” appendix.

The MRP Exception report and the Material Requirements Selection report are the same.

Notes

Part 5
Using the Demand Fulfillment Workbench

5

The part consists of the following topics:

Overview of Using the Demand Fulfillment Workbench

The Demand Fulfillment Workbench provides planners, production control, and materials managers with a central location to manage and correct exception situations for MPS and MRP. Exception examples include new orders that need to be released to satisfy shortages and existing orders that need to be canceled or rescheduled to keep supply and demand balanced.

This workbench allows for swift strategy creation and rapid responses to critical information regarding resources, materials, equipment, and money.

After you set display and authority controls for the workbench, process information through the workbench by selecting an exception situation. Then you correct the situation by using Action codes to perform the applicable processing.

After you complete this part, you should understand and be able to use the Demand Fulfillment Workbench.

Defining Demand Fulfillment Workbench Controls

Setting Infinium CA Demand Fulfillment Controls

The way in which the Demand Fulfillment Workbench displays depends on your settings in the Infinium CA *Work with User Selections* option. The workbench can display by the following:

- Message ID
- Product
- Formula

You can set the workbench to display only MPS or MRP messages, or both. You can also predetermine selections such as a particular Planner, Buyer, Commodity code, or Product Family status.

Regardless of the current display format, you can press F8 from the Demand Fulfillment Workbench selection screen to view the display in a different manner.

You also define controls at the Infinium MP Entity, Company, and Warehouse levels that specify:

- Whether or not you can delete firm planned batches, scheduled batches, or both
- Whether or not deletion of requisitions is allowed

In Infinium CA, define the default views that the system displays in the workbench. Define this information in the *Work with User Selections* option.

Use the menu path below.

- Infinium CA
- *Control Files*
  - *Work with User Selections* [WWUS]

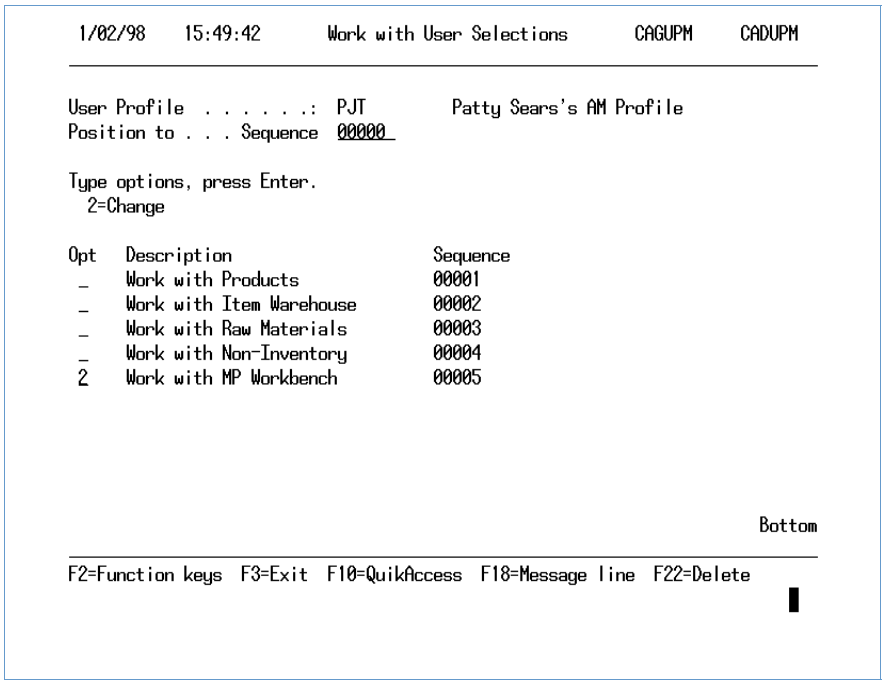


Figure 5-1: Work with User Selections screen

Type a **2** beside the Work with MP Workbench attribute and press Enter.

The system displays the Work with MP Workbench attribute in the Infinium CA *Work with User Selections* option only if you type **S2K** in the *Advanced Planning* field in the System Information attribute in *Work with Entity Controls* option within Infinium CA. The entry **S2K** in this field indicates that you have Infinium MP installed.

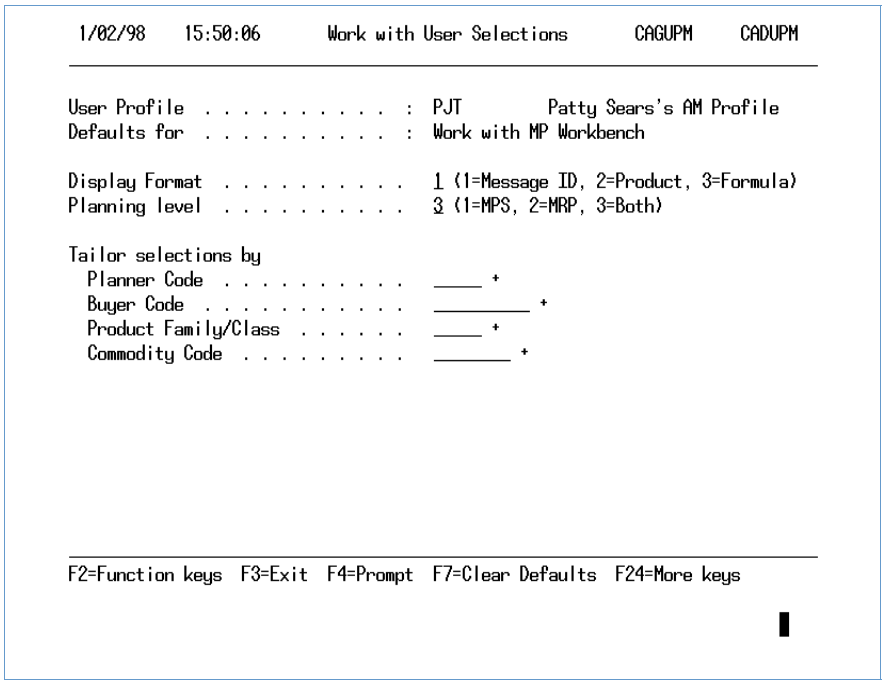


Figure 5-2: Work with User Selections Workbench Defaults screen

Defining Infinium MP Workbench Defaults

Complete the fields on this screen to further customize the default view in the Demand Fulfillment Workbench that the system displays for your user profile.

Required entries include the *Display Format* and *Planning level* fields. Type an entry in the *Display Format* field to select whether the workbench displays exception situations by message ID, product, or formula. Type an entry in the *Planning level* field to determine whether the workbench displays only MPS messages, only MRP messages, or both.

To further customize your display, complete the fields under the Tailor selections by heading.

Press F7 to clear the default information.

Setting Infinium MP Demand Fulfillment Controls

At the Infinium MP Entity, Company, and Warehouse levels, you must set controls that specify:

- Whether you can delete firm planned batches, scheduled batches, or both
- Whether deletion of requisitions is allowed

Use the menu path below.

- Infinium MP
- *Control Files*
  - *Work with Entity* [WWE]

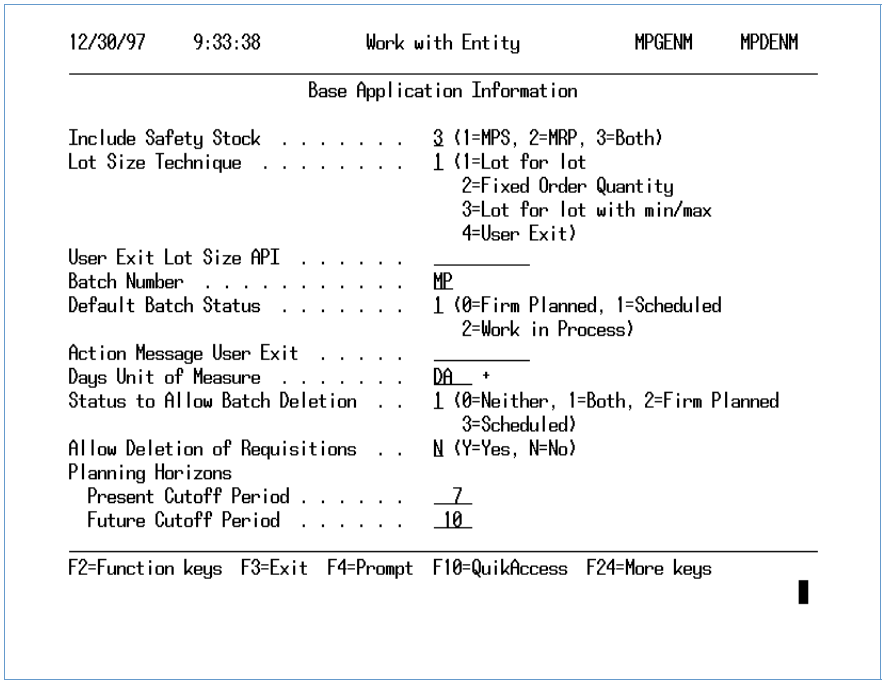


Figure 5-3: Work with Entity Base Application Information screen

Defining Batch and Requisition Deletion Controls

The system displays this screen when you type **2** to select the Base Application information attribute from the Work with Entity selection screen and press Enter.

Set these controls from the Base Application Information Attributes screens at the Infinium MP Entity, Company, and Warehouse Control levels. The system uses the Control file hierarchy to determine the controls to follow. See the “Maintaining Control Files” part in this guide for more information about the Control File hierarchy.

The following fields directly affect the Demand Fulfillment Workbench.

Status to Allow Batch Deletion
Your entry in this field controls whether or not users can delete manufacturing batches from within the Demand Fulfillment Workbench.

The system does not allow you to delete Work in Process batches, regardless of your entry in this field.

Allow Deletion of Requisitions
If you type **Y** in this field, users can delete requisitions from within the Demand Fulfillment Workbench.

If you type **Y** in this field, the system further checks the security established for a user in the Infinium PM system. Only users who are authorized in Infinium PM to delete requisitions, can delete requisitions from within the Demand Fulfillment Workbench. The system does not perform this check until the Demand Fulfillment Workbench calls the Infinium PM programs.

Displaying Information in the Demand Fulfillment Workbench

The Demand Fulfillment Workbench allows you to tailor the way in which the system displays information. The three display modes for the Workbench are:

- By Message ID
- By Product
- By Formula

Define the default display for your user profile in the Infinium CA option *Work with User Selections*. See the “Setting Infinium CA Demand Fulfillment Controls” topic for more information about setting this control. The screens that follow provide an example of each display default.

Message ID Display

The screen below shows the way in which the screen displays information if your user profile is set to display by Message ID as the default.

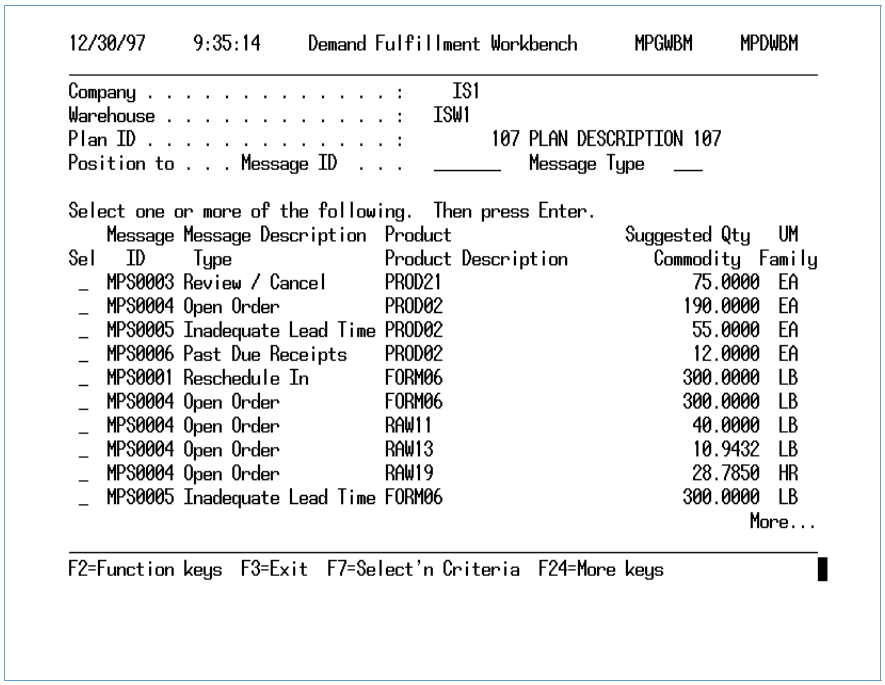


Figure 5-4: Demand Fulfillment Workbench Message ID selection screen

Product Display

The screen below shows the way in which the screen displays information if your user profile is set to display by Product as the default.

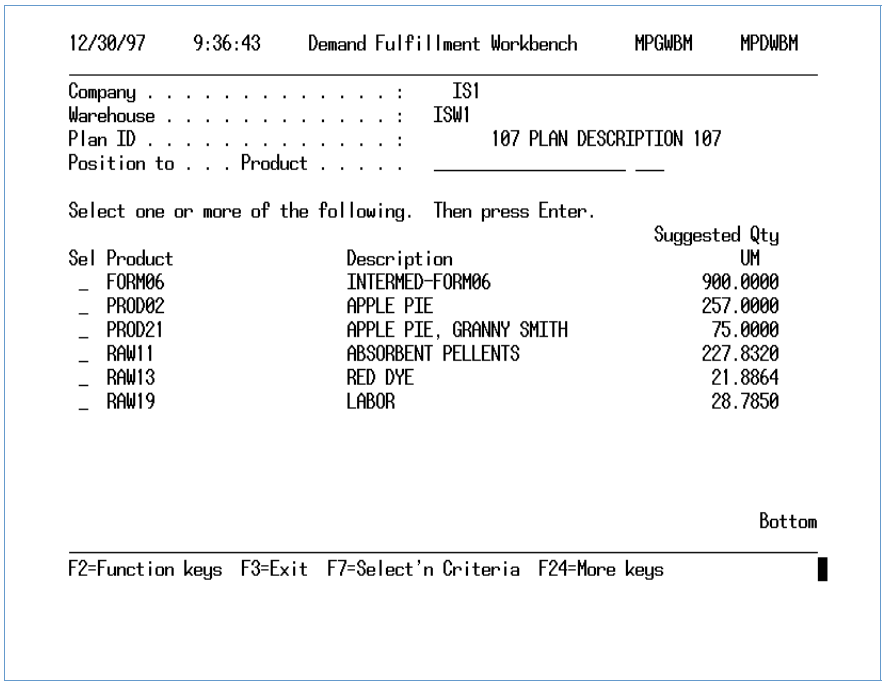


Figure 5-5: Demand Fulfillment Workbench Product selection screen

Formula Display

The screen below shows the way in which the screen displays information if your user profile is set to display by Formula as the default.

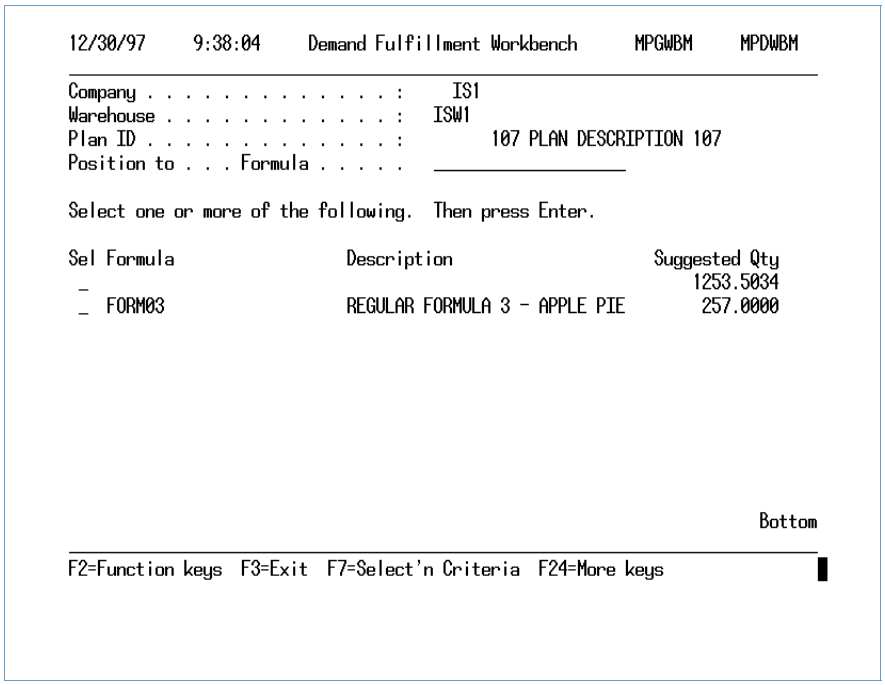


Figure 5-6: Demand Fulfillment Workbench Formula selection screen

Using the Demand Fulfillment Workbench

When you select the *Demand Fulfillment Workbench* option, the system displays only plans to which you are authorized for the company and warehouse location.

The company and warehouse default from the Infinium CA *Control Files* option, within the *Work with User/Warehouse file* option.

Use the menu path below.

- *Master Production Scheduling*
  - *Demand Fulfillment Workbench* [DFW]

```
12/30/97     9:39:28     Demand Fulfillment Workbench      MPGWBM     MPDWBM
_____________________________________________________________________________
Company . . . . . . . . . . . . . :    IS1
Warehouse . . . . . . . . . . . . :   ISW1
Plan ID . . . . . . . . . . . . . :        107 PLAN DESCRIPTION 107
Position to . . . Message ID  . . .   ______   Message Type   ___

Select one or more of the following.  Then press Enter.
    Message Message Description  Product                Suggested Qty   UM
Sel   ID     Type                Product Description       Commodity  Family
 _  MPS0003 Review / Cancel      PROD21                        75.0000  EA
 _  MPS0004 Open Order           PROD02                       190.0000  EA
 _  MPS0005 Inadequate Lead Time PROD02                        55.0000  EA
 _  MPS0006 Past Due Receipts    PROD02                        12.0000  EA
 _  MPS0001 Reschedule In        FORM06                       300.0000  LB
 _  MPS0004 Open Order           FORM06                       300.0000  LB
 _  MPS0004 Open Order           RAW11                         40.0000  LB
 _  MPS0004 Open Order           RAW13                         10.9432  LB
 _  MPS0004 Open Order           RAW19                         28.7850  HR
 _  MPS0005 Inadequate Lead Time FORM06                       300.0000  LB
                                                                 More...
_____________________________________________________________________________
F2=Function keys  F3=Exit  F7=Select'n Criteria  F24=More keys
```

Figure 5-7: Demand Fulfillment Workbench selection screen

The sequence on the screen above and in the section that follows is by Message ID.

Press F11 to view additional information on this screen.

If your display sequence is by formula, the quantity that the system displays reflects the total of all products from this run created by the formula.

To select a message on which to take action (or formula or product depending on the screen sequencing), type a **1** beside it and press Enter. You can make more than one

selection at a time. If you select a plan that was not generated in detail, the system displays a message informing you of this. Use only plans generated in detail in the Demand Fulfillment Workbench. To remedy this, work with another plan or regenerate your original plan in detail.

For action messages MPS0004 (Open Order), MPS0005 (Inadequate Lead Time) and MPS0007 (Exceeded Maximum Reorder Quantity), the system lists the individual products when you take an action to create a batch or a requisition. For all other action messages, the individual batches and/or requisitions display on the Demand Fulfillment Workbench screen.

If no plans are authorized for you at this company and warehouse location, the system displays a message informing you of this. Press F8 to select an authorized plan from another company and warehouse (if you are authorized to do so) or exit this option and authorize the plan in question.

The plan that the system retrieves is the authorized plan for your default company and warehouse. If none of your plans are authorized, the system sends you a message. Then you must select an existing authorized plan or exit this option and authorize a plan.

Before you select the exception on which you are taking action, press F8 to include other criteria within your display.

Changing Selection Criteria

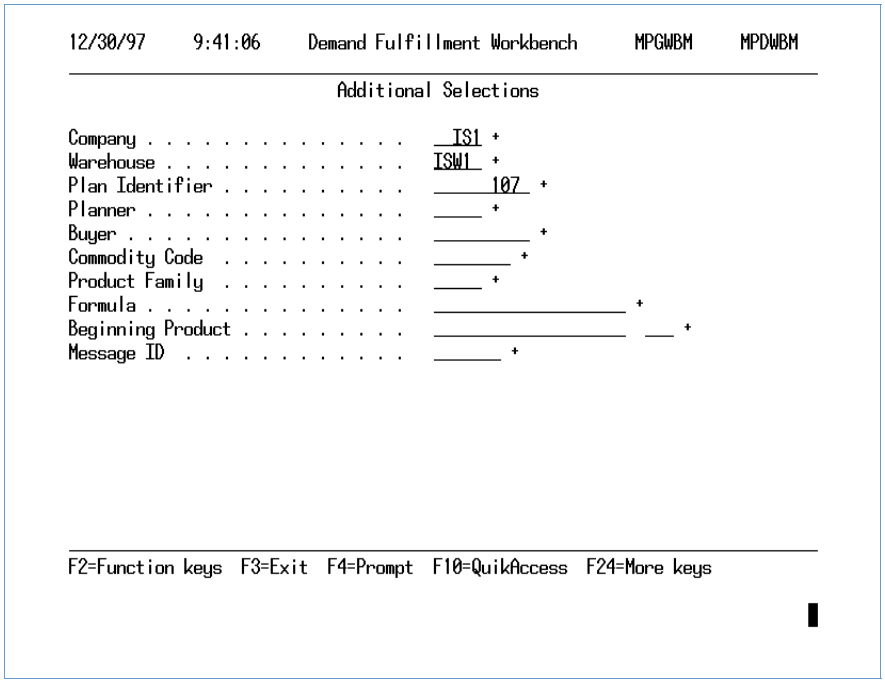


Figure 5-8: Additional Selections screen

When you press F8, the system displays the Additional Selections screen where you can add to or change the plan selection criteria. Adding to or changing your selections causes the system to rebuild and redisplay the Demand Fulfillment Workbench list of information.

The system uses your user default company and warehouse on the initial selection screen. You can override these if your user profile allows for multiple companies and warehouses.

Viewing Display Default Settings

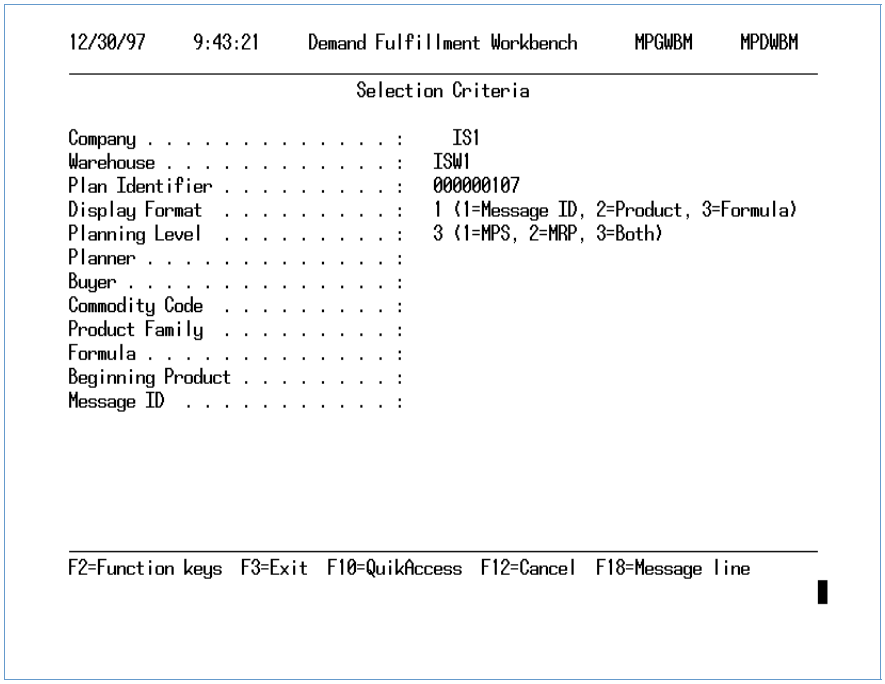


Figure 5-9: Selection Criteria screen

You can also view the default display settings that are defined for your user profile, by pressing F7 on the Demand Fulfillment Workbench selection screen.

To alter selection criteria, press F12 to cancel out of this screen and return to the Demand Fulfillment Workbench screen. From there, press F8 to go to the Additional Selections screen.

Using Action Codes

After you set your display selections, type **1** next to the message (or formula or product depending on the screen sequencing) on which you are taking action. Then press Enter to display the Demand Fulfillment Workbench screen where you define the actions that you will take.

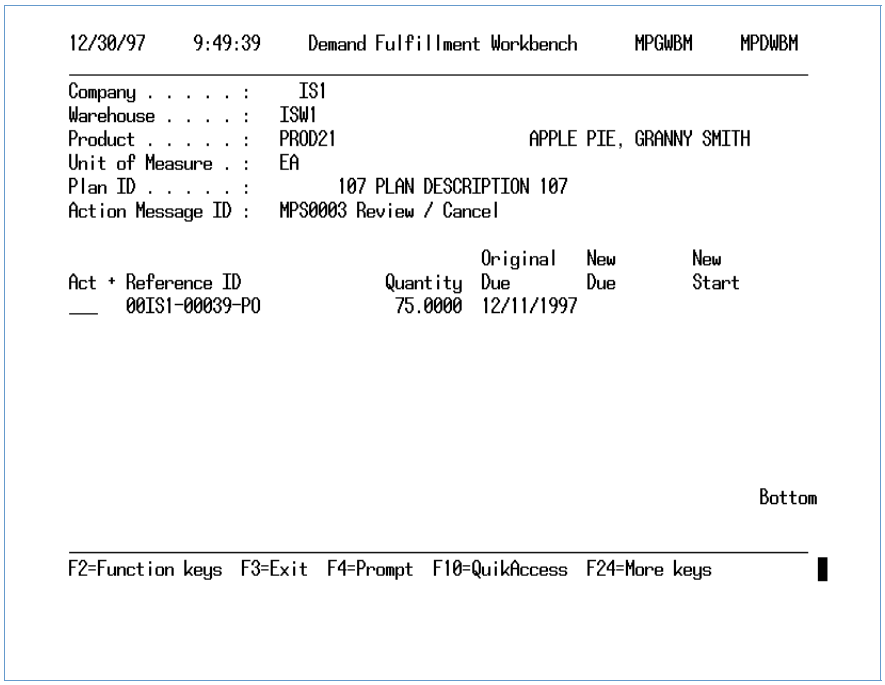


Figure 5-10: Demand Fulfillment Workbench screen

Type an Action code in the *Act* field to work with the applicable item.

Each message ID corresponds to an exception condition that requires some further action or decision. For example, the Message ID MPS006 indicates that there is a past due receipt for a product in Infinium PM or a manufacturing batch in Infinium MC.

From the Demand Fulfillment Workbench selection screen, type the appropriate Action code next to a message ID, product, or formula to take further action.

Specific action messages correspond to certain message IDs. For example, the Action code CD, represents the action Change Date. You can apply this action only to message IDs MPS0001 (Reschedule in), MPS0002 (Reschedule out), or MPS0006 (Past due receipts).

For manufacturing batches, the system limits Action codes CD (Change Date), DL (Delete Receipt), and MR (Maintain Receipt) to batches with the status of firm planned or scheduled production.

The tables that follow illustrate message ID descriptions, available Action codes, their descriptions, the message IDs to which they are applicable, and the result of the actions that you can take.

The table below lists action message IDs that display in the Demand Fulfillment Workbench and their descriptions.

Action Message ID	Action Message Description
MPS0001	Reschedule In
MPS0002	Reschedule Out
MPS0003	Review/Cancel
MPS0004	Open Order
MPS0005	Inadequate Lead Time
MPS0006	Past Due Receipts
MPS0007	Exceeded Maximum Reorder Quantity

The table below lists Action codes, their descriptions, the message ID to which they apply, and the result of using an Action code on them.

Action Code	Description	Applicable Message ID	Result
CB	Create batch	MPS0004 (Open Order) MPS0005 (Inadequate Lead Time) MPS0007 (Exceeded Maximum Reorder Quantity) Use only on products that have a formula assigned to them in the Product file.	If you select this Action code, the system displays the Demand Fulfillment Workbench Create Batch screen, and from here you can schedule a batch.
CBD	Create batch using defaults	MPS0004 (Open Order) MPS0005 (Inadequate Lead Time) MPS0007 (Exceeded Maximum Reorder Quantity) Use only on products that have a formula assigned to them in the Product file.	If you select this Action code, the system automatically creates the batch for you using default information.

Action Code	Description	Applicable Message ID	Result
CR	Create requisition	MPS0004 (Open Order) MPS0005 (Inadequate Lead Time) MPS0007 (Exceeded Maximum Reorder Quantity) You can create requisitions for purchased or manufactured products.	If you select this Action code, the system displays the Demand Fulfillment Workbench Create Requisition screen, and from here you can create a requisition.
CRD	Create requisition using defaults	MPS0004 (Open Order) MPS0005 (Inadequate Lead Time) MPS0007 (Exceeded Maximum Reorder Quantity) You can create requisitions for purchased or manufactured products.	If you select this Action code, the system automatically creates the requisition for you using default information.
CD	Change date	MPS0001 (Reschedule In) MPS0002 (Reschedule Out) MPS0006 (Past Due Receipts)	If you select this Action code for a manufactured batch, the system displays the Work with Batch Dates screen. If you select this Action code for a purchased product, the system displays the Purchase Requisition header screen.

Action Code	Description	Applicable Message ID	Result
DL	Delete receipt	MPS0003 (Review/Cancel)	If you select this Action code for a manufacturing batch, the system displays the Delete Batches Confirmation screen. If you select this Action code for a purchase requisition, the system displays the Purchase Requisition header screen. Within Infinium MC you can delete only firm planned or scheduled batches. Also, you can delete batches only if the *Status to allow batch deletion* field in the Infinium MP Control files is set to **1** for both, **2** for firm planned batches only, or **3** for scheduled batches only. If this flag is set to **2** or **3**, you can delete only those specific types of batches. Regarding purchase requisitions, the system checks the setting in the *Allow deletion of requisitions* field in the Infinium MP Control files and in your Infinium PM user profile setup to ensure that you are authorized to delete requisitions. The Demand Fulfillment Workbench performs the Infinium PM authority check once it calls the Infinium PM programs.
MR	Maintain receipt	MPS0001 (Reschedule In) MPS0002 (Reschedule Out) MPS0003 (Review/Cancel) MPS0006 (Past Due Receipts)	If you select this Action code for a manufacturing batch, the system displays the Work with Batch Dates screen where you can edit an existing firm planned or scheduled batch. If you select this Action code for purchase requisitions, the system displays the Purchase Requisition header screen where you can edit requisition information.

Action Code	Description	Applicable Message ID	Result
DR	Display receipt	MPS0001 (Reschedule In) MPS0002 (Reschedule Out) MPS0003 (Review/Cancel) MPS0006 (Past Due Receipts)	If you select this Action code for an existing manufacturing batch, the system displays the Display Batch selection screen. If you select this Action code for an existing purchase requisition, the system displays the Requisition Inquiry header screen.
PR	Display product requirements	You can enter this Action code on any message.	If you select this Action code, the system displays the Display Available to Promise screen.
RL	Display resource load	You can enter this Action code on any message.	If you select this Action code, the system displays the Resource Load Summarization screen. The system assumes defaults for various fields.
DM	Display MPS/ MRP	You can enter this Action code on any message.	If you select this Action code, the system displays the Display Master Production Schedule screen or the Display Material Requirements screen. The screen you go to depends on the message type.
RC	Rough Cut Capacity Planning report	You can enter this Action code on any message.	If you select this Action code, the system displays the Rough Cut Capacity Report screen. The system assumes defaults for various fields.

When you select the Action codes CB, CR, CD, DL, CBD, CRD, or MR, the system writes an audit record to the Action Message Audit file which tracks all action message activity. You can purge action message history using the *Purge Action Message Audit File* option. See the “Purging Action Messages from the Audit File” topic.

Using the Action Codes CBD and CB

Using CBD

The Action code CBD (Create Batch Defaults) allows you to have the system automatically create the batch for you using default information. If you use CBD, the system automatically creates the batch with the necessary fields defaulted in, and returns you to the main menu.

Using CB

If you use the CB (Create Batch) Action code, the system displays the Demand Fulfillment Workbench Create Batch screen where you can schedule a batch for Open Orders, Inadequate Lead Times, and Exceeded Maximum Reorder Quantities.

You can use the CBD and CB Action codes only on products with a formula assigned to them in the Product file.

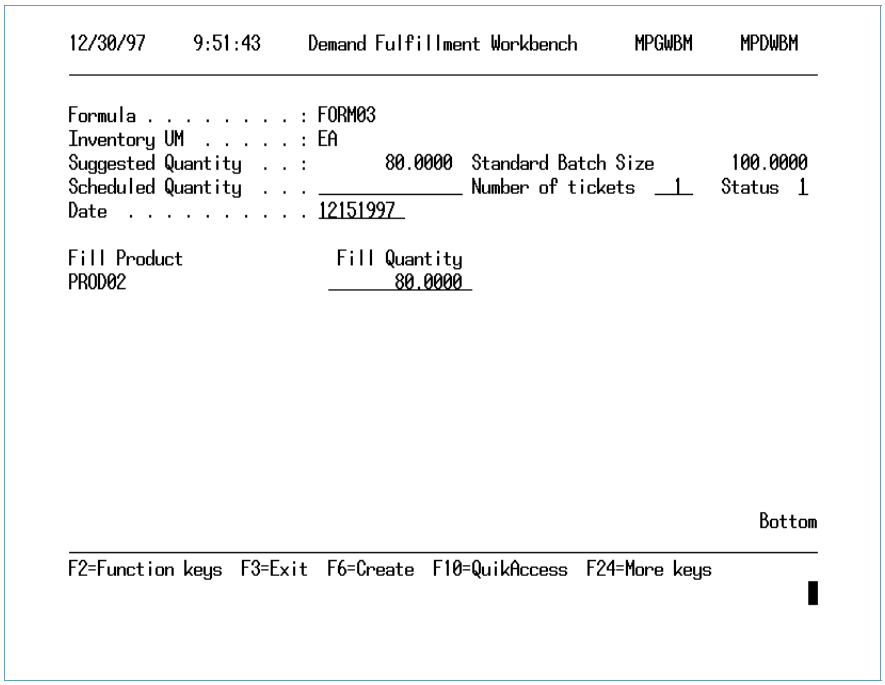


Figure 5-11: Demand Fulfillment Workbench Create Batch screen

The system displays this screen when you type **CB** in the *Act* field for an applicable message ID, product, or formula. From this screen, you can change the scheduled quantity and create the batch. To create a batch, press F6.

If lot control is enabled and you create a batch through this function, the system creates the lot number when the batch is created. If your controls are set up to assign the lot number based on the manufacturing batch number, the manufacturing batch number is used as the lot identifier. If your controls are set up to automatically generate a lot number, the system assigns the next available lot number for the lot identifier.

Using the Action Codes CRD and CR

Using CRD

The Action code CRD (Create Requisitions Using Defaults) allows you to have the system automatically create the requisition for you using default information. If you use CRD, the system automatically creates the requisition with the necessary fields defaulted in and returns you to the main menu.

The requisition type APS must exist in Infinium PM prior to automatically creating requisitions from Infinium MP.

Using CR

If you use the CR (Create Requisition) Action code, the system takes you to the Demand Fulfillment Workbench Create Requisition screen where you can create a purchase requisition.

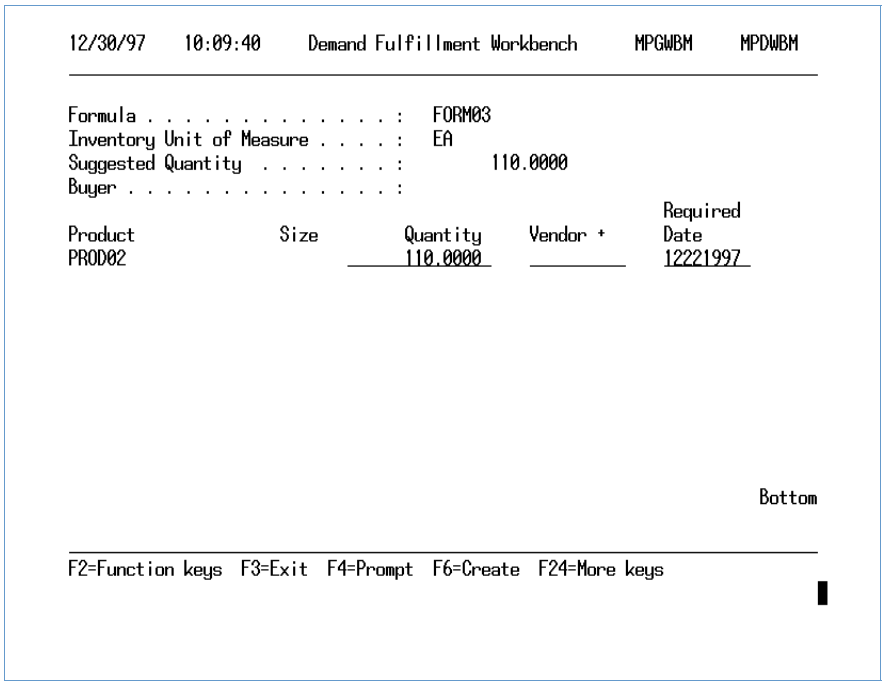


Figure 5-12: Demand Fulfillment Workbench Create Requisition screen

The system displays this screen when you type **CR** in the *Act* field for an applicable message ID, product, or formula.

On this screen, you can enter a vendor or change the date. To create a requisition, press F6.

Using the CD Action Code on Infinium PM Requisitions

If you select the Action code CD (Change Date) for a purchase requisition, the system displays the Infinium PM Purchase Requisition header screen.

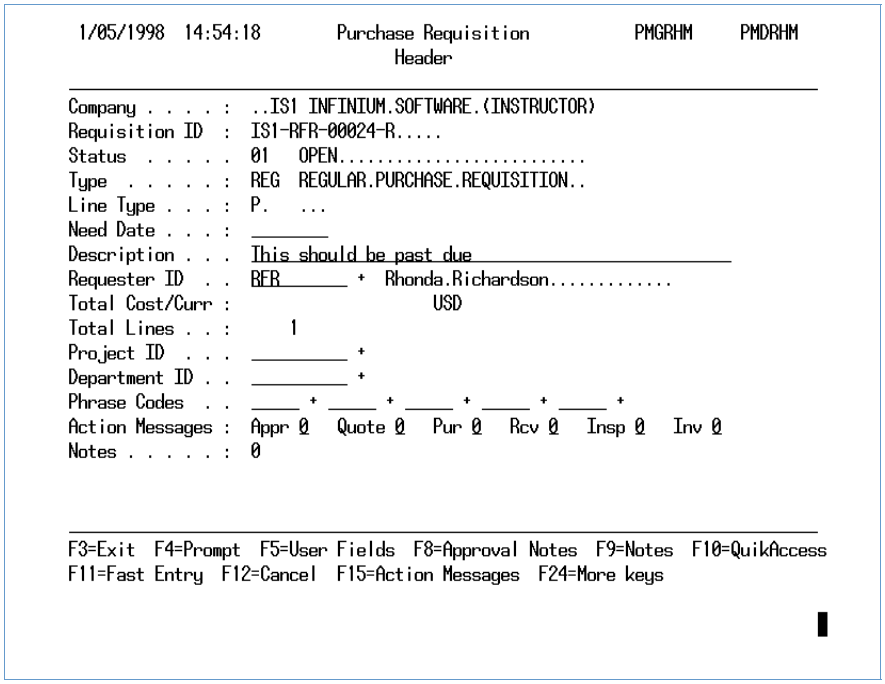


Figure 5-13: Purchase Requisition header screen

From this screen you can change the date of the requisition.

The system may not allow you to change requisition information if your Infinium PM user controls do not authorize you to do so.

Using the DL Action Code on Infinium PM Requisitions

If you select the Action code DL (Delete Receipt) for a purchase requisition, the system displays the Infinium PM Purchase Requisition header screen.

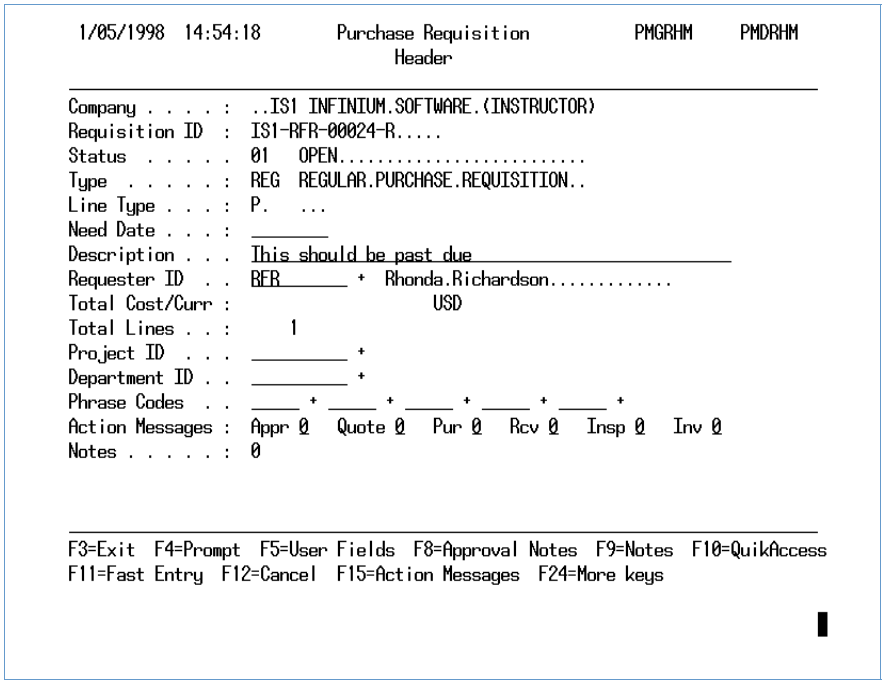


Figure 5-14: Purchase Requisition header screen

From this screen you can delete the requisition. To do so, press F22.

Depending on your Infinium PM user controls, you may not be authorized to delete a requisition.

Using the MR Action Code on Infinium PM Requisitions

If you select the Action code MR (Maintain Receipt) for a purchase requisition, the system displays the Infinium PM Purchase Requisition header screen.

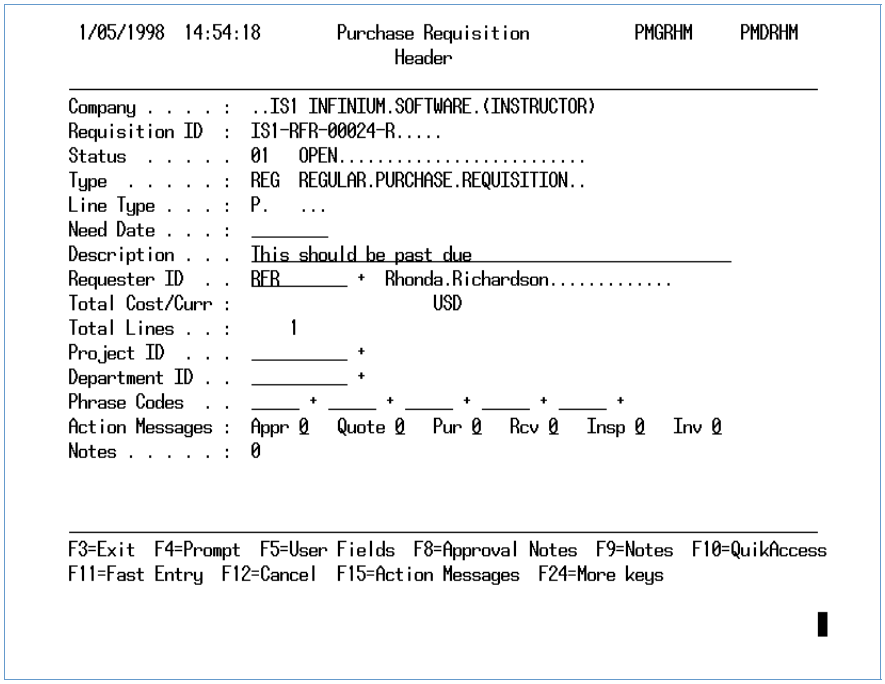


Figure 5-15: Purchase Requisition header screen

From this screen you can change the requisition header information or press Enter to access the Detail selection screen.

Depending on your Infinium PM user controls, you may not be authorized to change a requisition.

Using the CD Action Code on Infinium MC Batches

If you select this action for a manufacturing batch, the system displays the Work with Batch Dates screen.

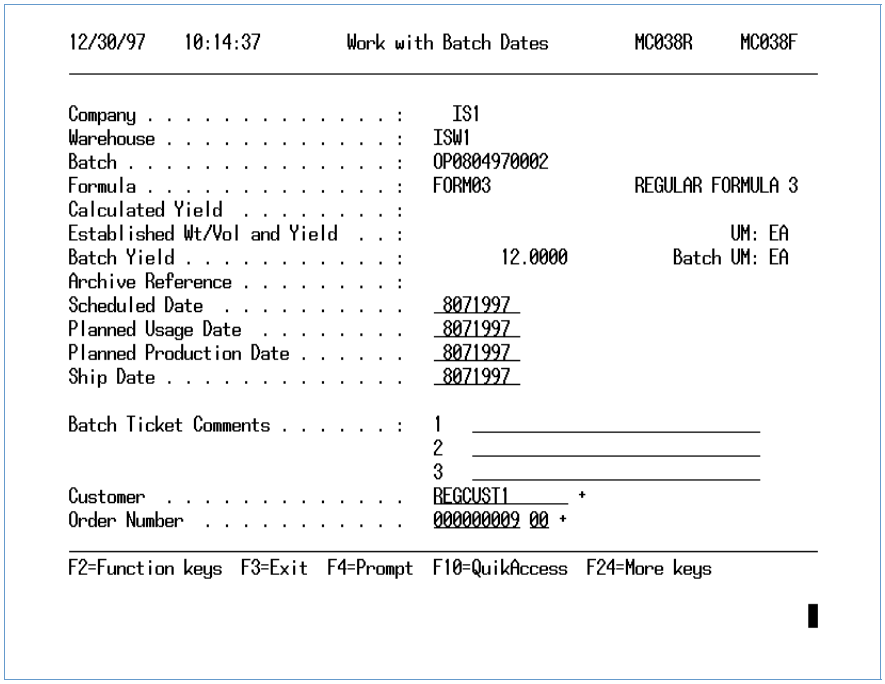


Figure 5-16: Work with Batch Dates screen

Use this screen to alter any date information for the batch.

If you select the DL action for a manufacturing batch, the system displays the Delete Batches Confirmation screen.

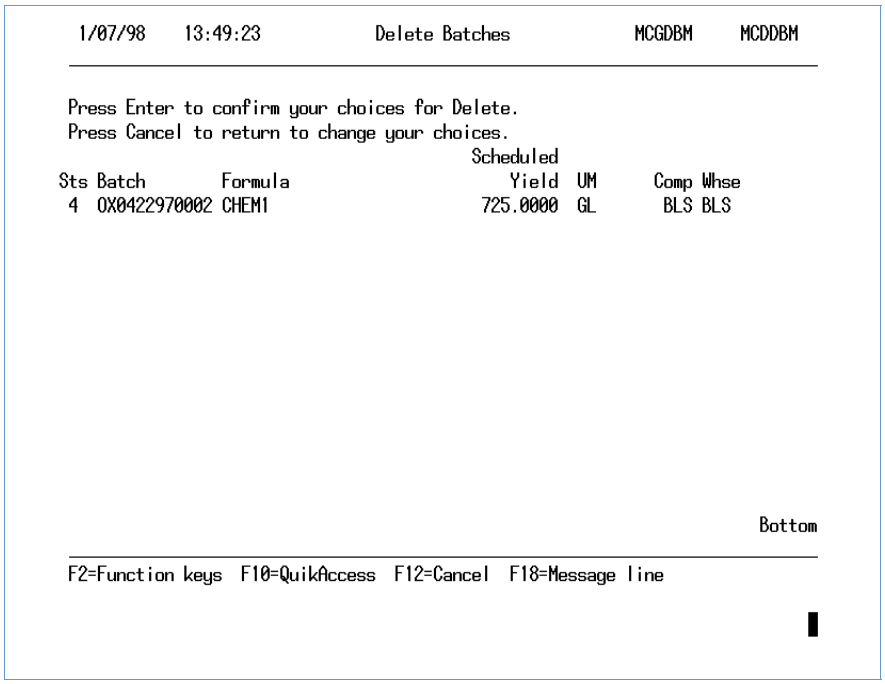


Figure 5-17: Delete Batches Confirmation screen

Press Enter to submit the job for deletion.

Using the MR Action Code on Infinium MC Batches

If you select the MR (Maintain Receipt) action for an existing manufacturing batch, the system displays the Work with Batch screen.

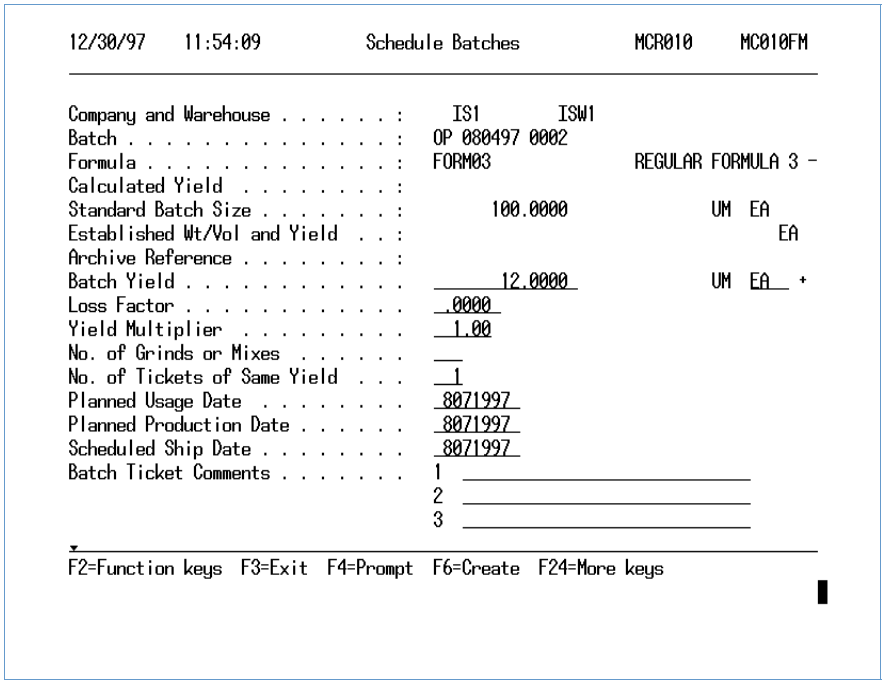


Figure 5-18: Schedule Batches screen

Use this screen to change dates, quantities, and other information for the manufactured batch.

Using the DR Action Code on Infinium PM Requisitions

If you select the DR (Display Scheduled Receipt) action for an existing purchase requisition, the system displays the Requisition Inquiry header screen.

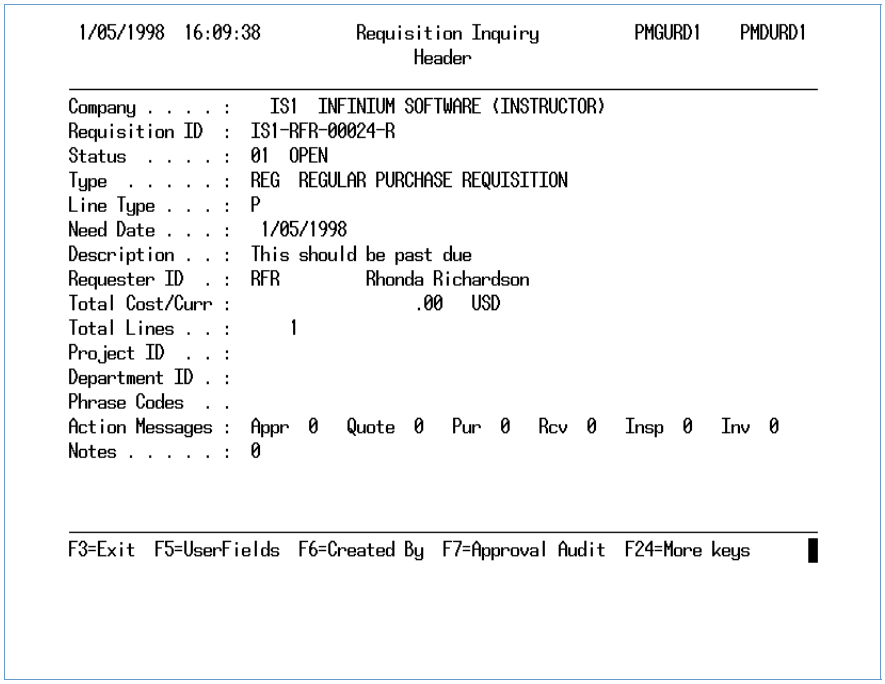


Figure 5-19: Requisitions Inquiry header screen

Use this screen to display various purchase requisition information.

Using the DR Action Code on Infinium MC Batches

If you select this action for an existing manufactured batch, the system displays the Display Batch selection screen.

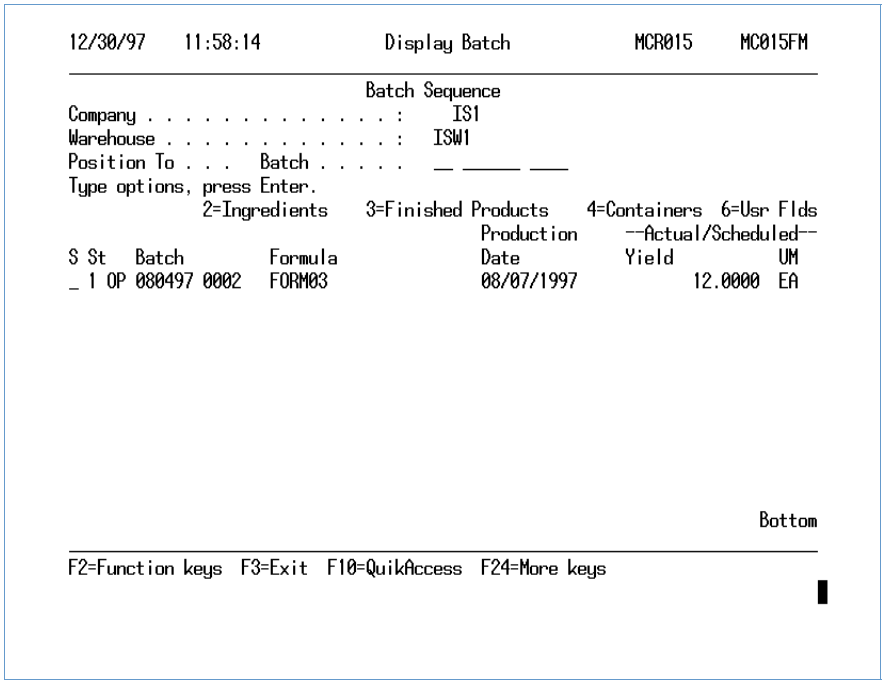


Figure 5-20: Display Batch selection screen

Use this screen to display various batch information.

Using the PR Action Code

Use the PR Action code on any action message to display the Display Available to Promise screen.

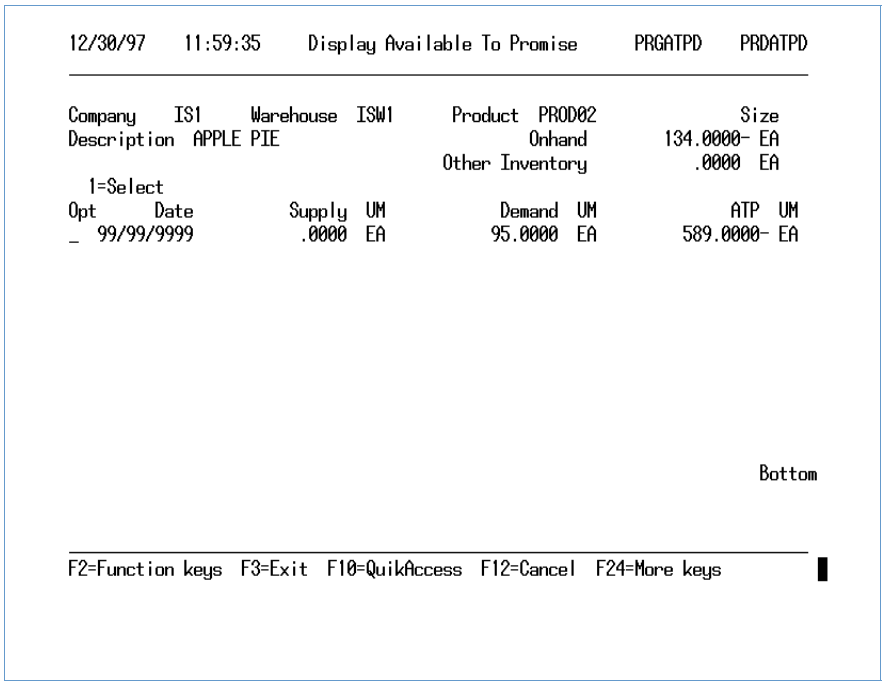


Figure 5-21: Display Available to Promise screen

Use this display to determine at what point you can promise delivery of products to your production facility. The system determines requirement quantities using the following equation:

On Hand + Other Inventory + Supply - Demand

Using the RL Action Code

Use the RL Action code on any action message to display the Resource Load Summarization screen.

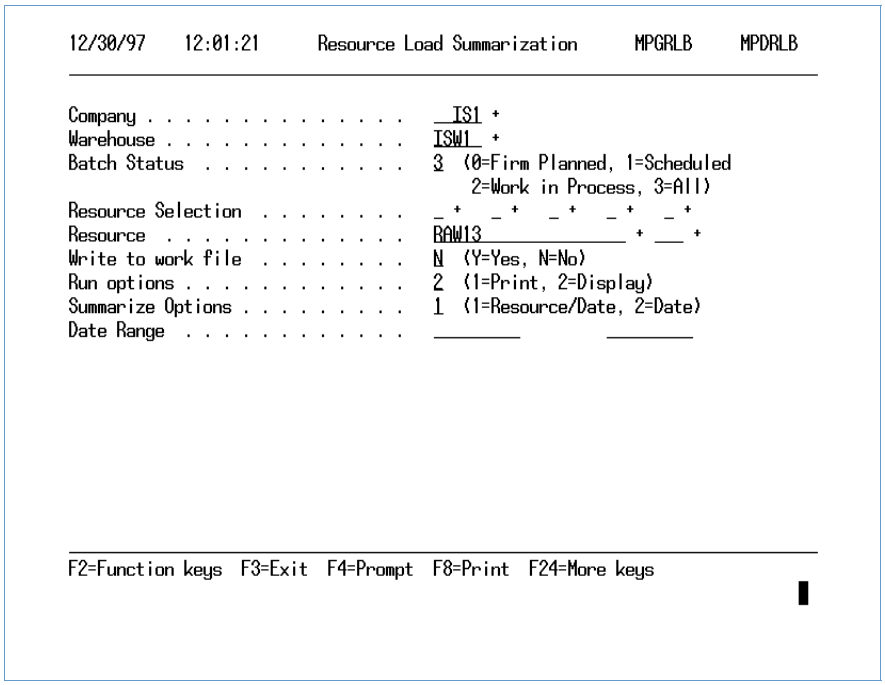


Figure 5-22: Resource Load Summarization screen

This option provides information about selected resources from either scheduled or in process batches in Infinium MC. The system defaults information in the fields on this screen as shown in the table below.

Field	Value
Batch status	**3**
Resource Selection	**blank**
Write to work file	**N**
Run options	**2**
Summarization Options	**1**

Field	Value
Beginning date	**00/00/0000**
Ending date	**00/00/0000**

Using the DM Action Code

Use the DM Action code on any action message to display either the Master Production Schedule screen or the Material Requirements Plan screen. The screen that the system displays depends on the message type. From either screen you can display various information.

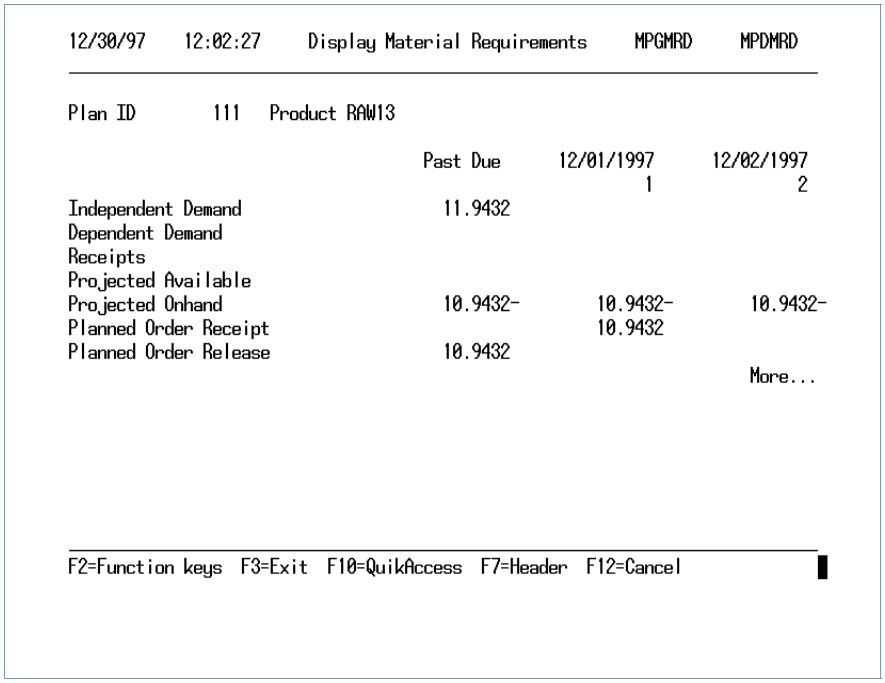


Figure 5-23: Display Material Requirements screen

The system displays this screen when you select the DM (Display MPS/MRP) Action code.

The system displays the appropriate option based on whether the Message ID is for an MRP or MPS.

Using the RC Action Code

Use the RC Action code on any message to display the Rough Cut Capacity Report screen. The system assumes several field defaults, which you can override.

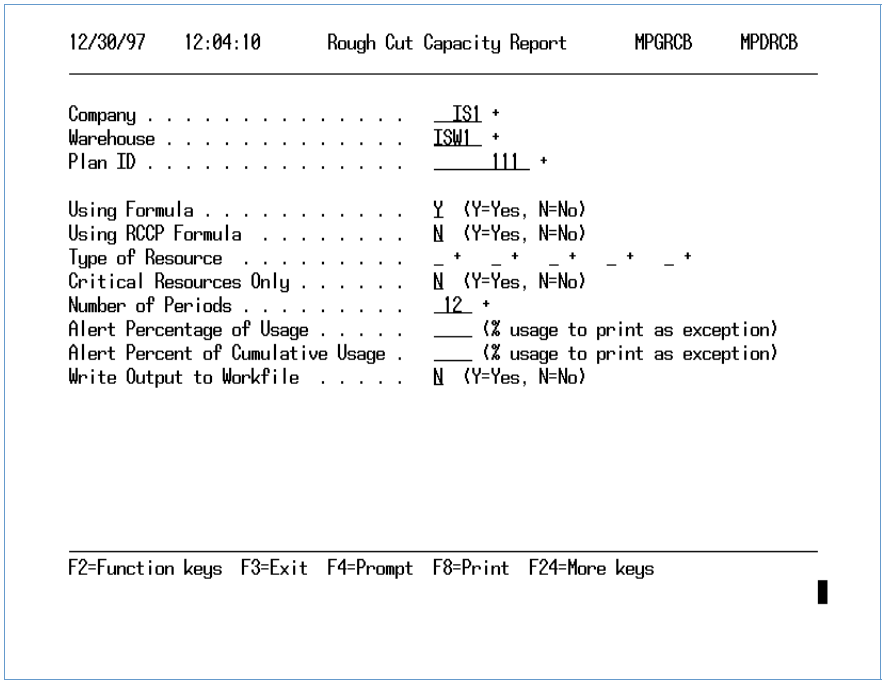


Figure 5-24: Rough Cut Capacity Report screen

When the system displays the Rough Cut Capacity screen, the screen contains the company, warehouse, plan ID, and number of periods in the plan that you are using. Additional information defaults as shown in the table below.

Field	Value
Using Formula	**Y**
Using RCCP Formula	**N**
Type of Resource	**blank**
Critical Resources Only	**N**
Write Output to Workfile	**N**

Once you complete the screen, press F8 to generate the Rough Cut Capacity report.

Purging Action Messages from the Audit File

When you use the Action codes CB, CR, CD, DL, CBD, CRD, or MR, the system writes an audit record to the Action Message Audit file, which tracks all action message activity. Periodically purge this file to conserve system resources.

Use the menu path below.

- *Utilities*
  - *Purge Action Message Audit File* [PAMAF]

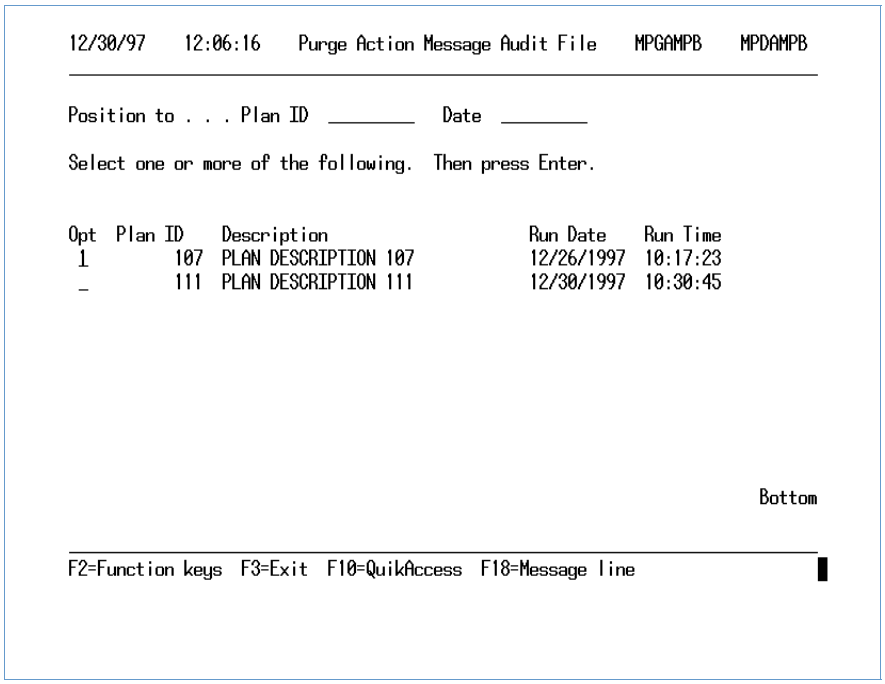


Figure 5-25: Purge Action Message Audit File screen

Type **1** beside the plan or plans you are selecting for the purge and press Enter.

Confirming the Purge

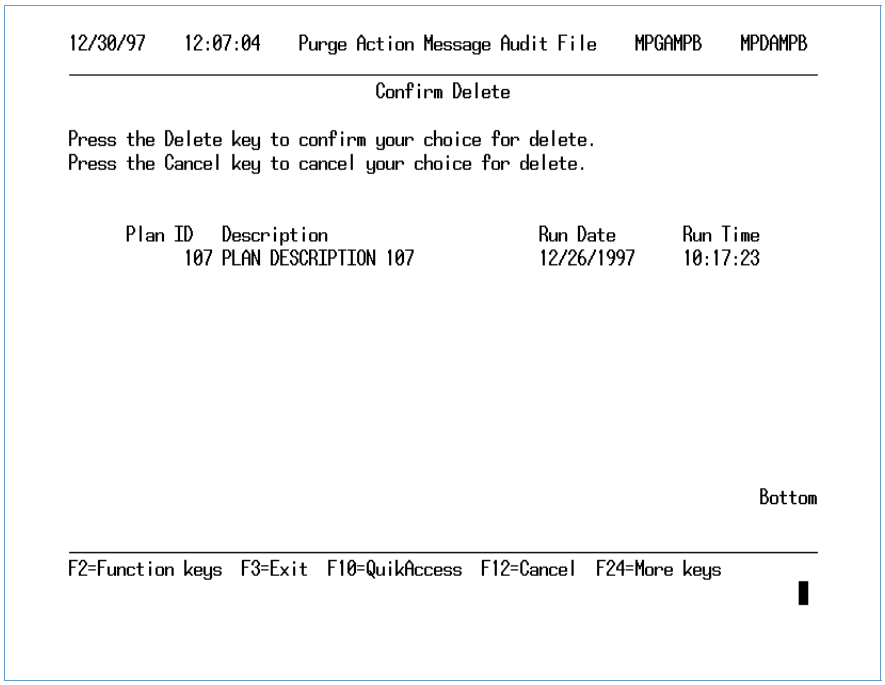


Figure 5-26: Purge Action Message Audit File Confirmation screen

Press F22 to confirm the purge or press F12 to cancel the purge.

Part 6
Infinium MP Displays

6

The part consists of the following topics:

Working with Available To Promise

The system provides you with options to view the availability of raw materials and products and how supply and demand created by customer, production, and purchase orders affects them.

Use the *Display Available To Promise* option to determine at what point you can promise delivery of products to your customer. The system calculates available to promise (ATP) quantities using the following equation:

On Hand + Other Inventory + Supply – Demand

Establish inventory types that make up each component for the available to promise equation in the Inventory Type file in the *Control Files* option in Infinium IC by the entries you make in the ATP column.

The *Display Available To Promise* function takes into account supply and demand created by orders entered through Infinium OP, Infinium PM, and Infinium MC.

Use the menu path below.

- *Advanced Planning Report/Display*
  - *Display Available To Promise* [DATP]

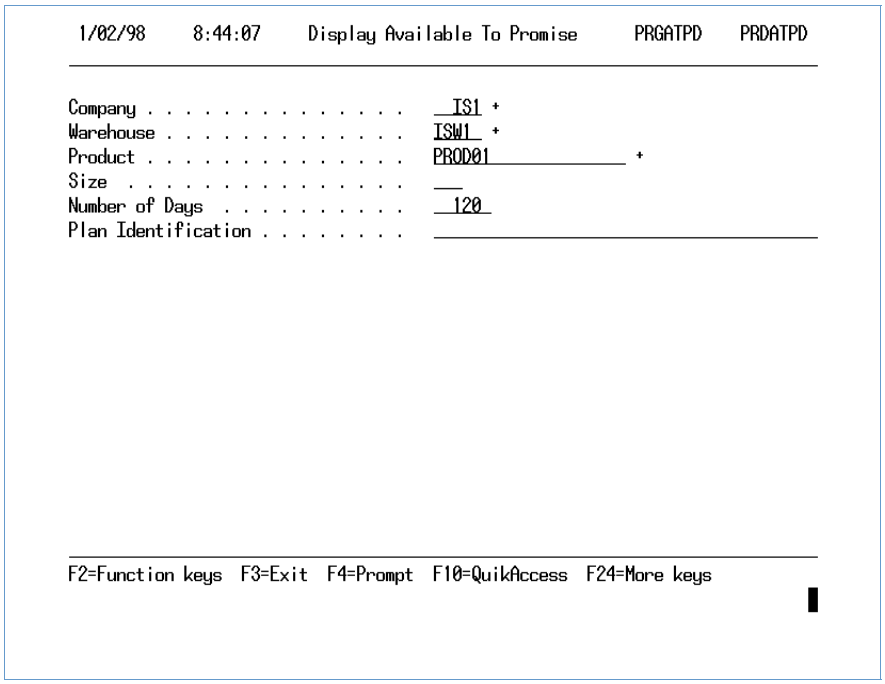


Figure 6-1: Display Available To Promise selection screen

The value in the *Number of Days* field determines how many days out from today's date the system calculates available to promise. You can override this value.

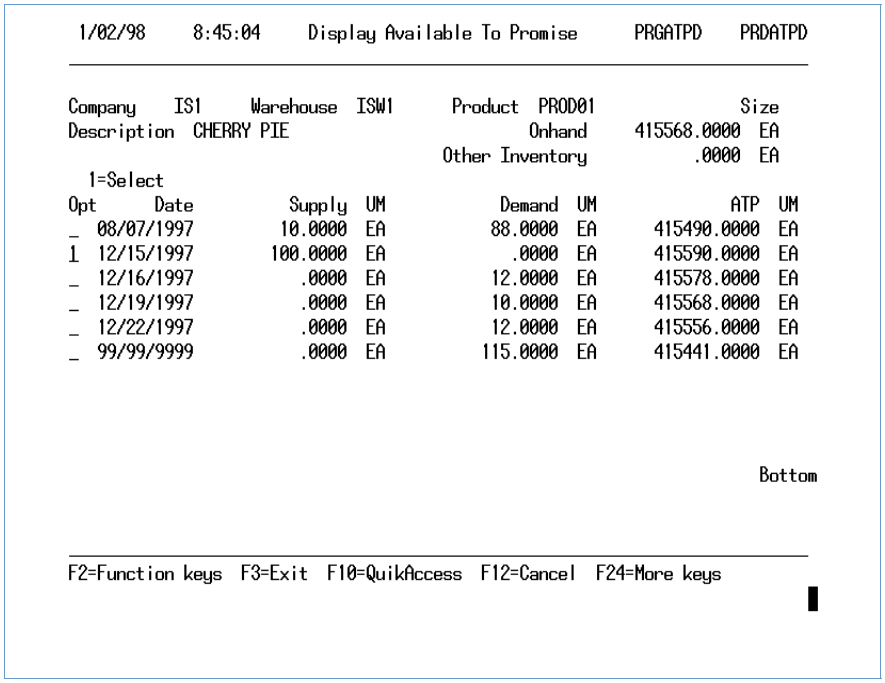


Figure 6-2: Display Available To Promise screen

From this screen press F21 to override the defaults which determine whether certain inventory types fall under the on hand, supply or demand categories. This override is only for this execution of the display.

ATP Overrides

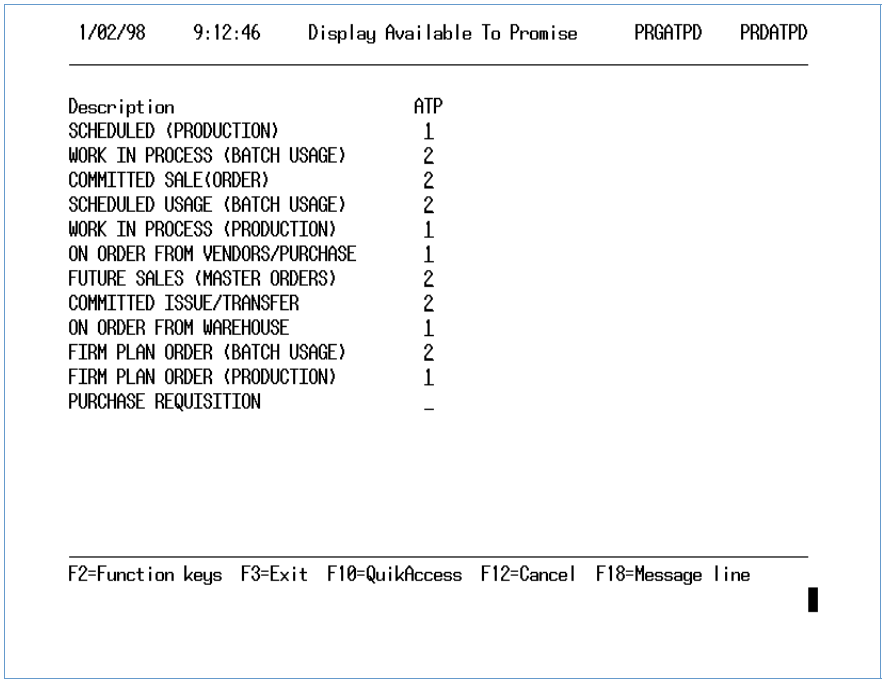


Figure 6-3: Display Available To Promise Override screen

Complete the *ATP* fields as follows:

- Leave the field blank to exclude any inventory type
- Type **1** to include inventory types in the supply total
- Type **2** to include inventory types in the demand total
- Type **3** to include inventory types in the other inventory total

Press Enter to return to the Display Available To Promise screen 1.

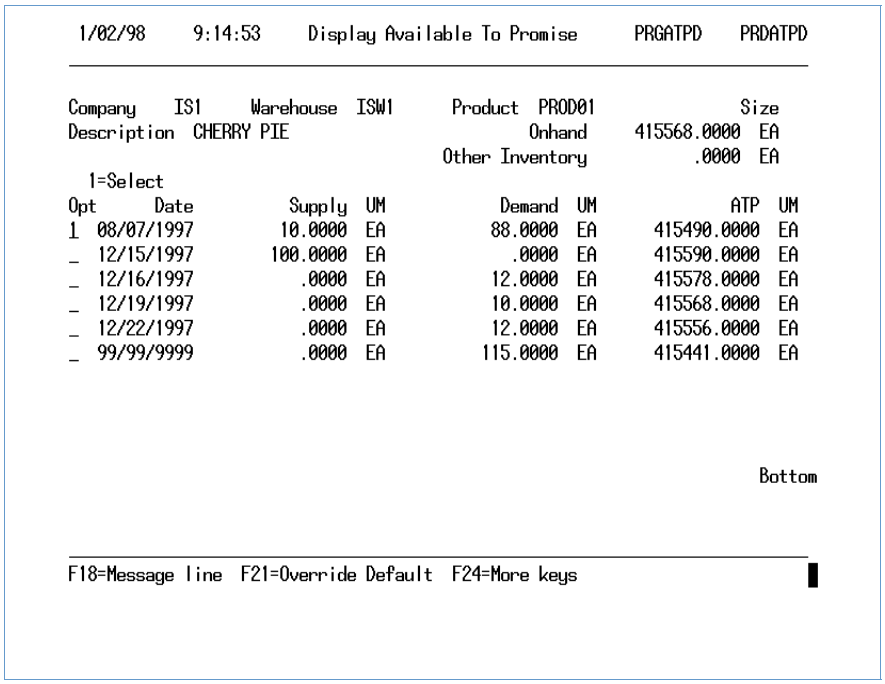


Figure 6-4: Display Available To Promise screen 1

When you return to the Display Available To Promise screen 1 shown above, the quantities reflect any changes made. The changes you make are for this display only and do not affect the permanent settings.

Sometimes you have data with a date of 99/99/99. The quantity in the Demand column for the date 99/99/99 reflects the total of all open customer orders where the *Requested Delivery Date* or *Scheduled Ship Date* field is blank, or production orders where the *Scheduled Production Date* field is blank.

The quantity in the Supply column for the date 99/99/99 reflects the total of all open production orders for the designated item where the *Scheduled Production Date* field is blank.

Type ***1*** in the *Opt* field next to any line to drill down to additional information detailing the production, purchase, or sales orders that make up the supply or demand quantities.

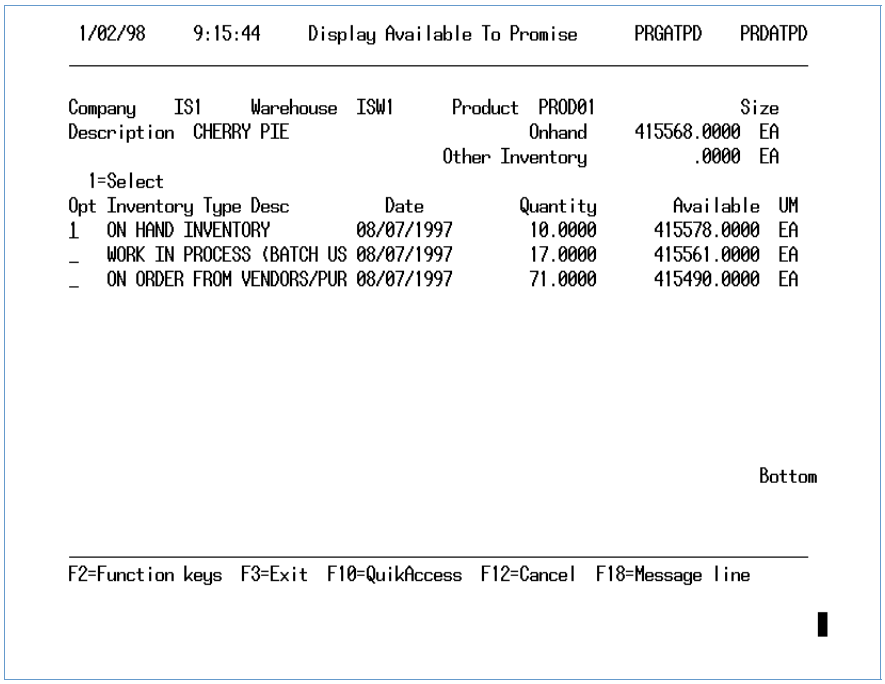


Figure 6-5: Display Available To Promise screen 2

This display includes the inventory types for all dates down to and including the date selected on the previous screen.

Type **1** in the *Opt* field to drill down to the next level of detail showing the specific orders making up the quantities for each inventory type.

ATP Drill Down

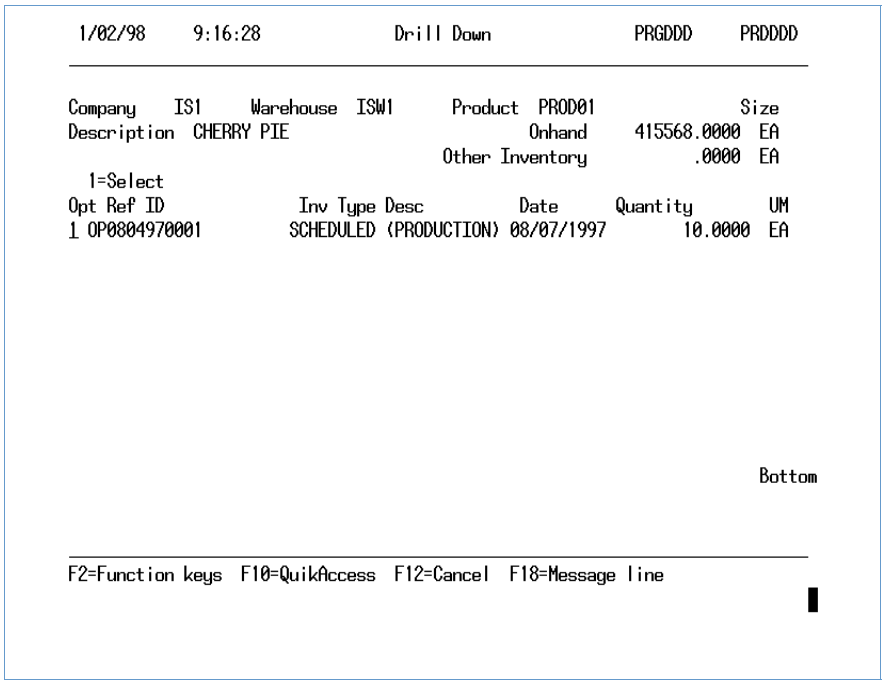


Figure 6-6: Display Available To Promise screen 3

The value the system displays in the *Ref ID* column is the Infinium MC batch number, the Infinium OP order number or the Infinium PM purchase order number.

Type **1** in the *Opt* field next to the Ref ID for which you want to drill down to the next level displaying the order details. The system displays the open order display information from the system in which the order originated.

For this example, the following screens are from Infinium MC.

Batch Information

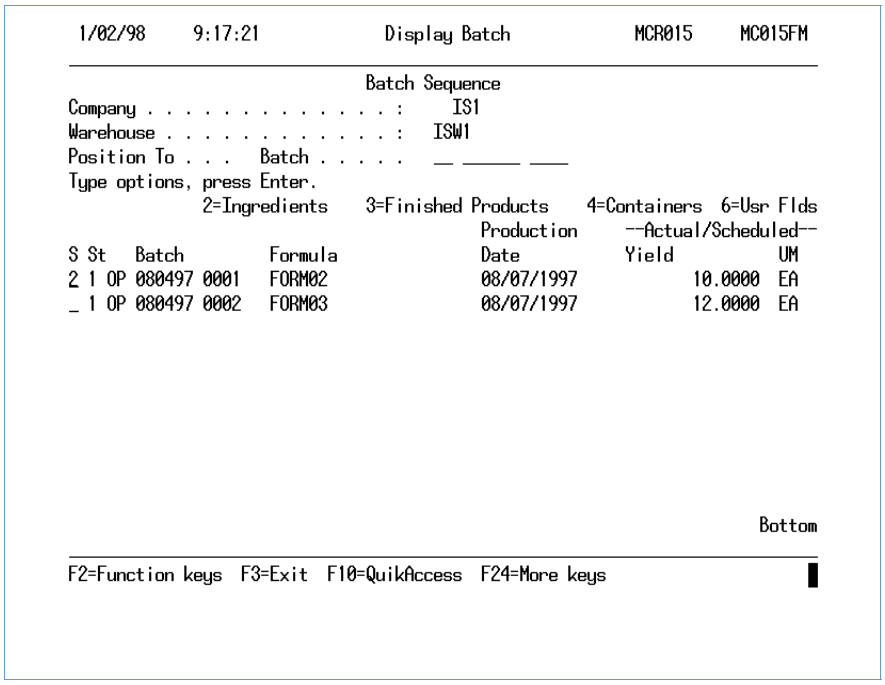


Figure 6-7: Display Batch screen 1

Type **2** in the *S* field and press Enter to display a list of the batch ingredients.

Ingredient Information

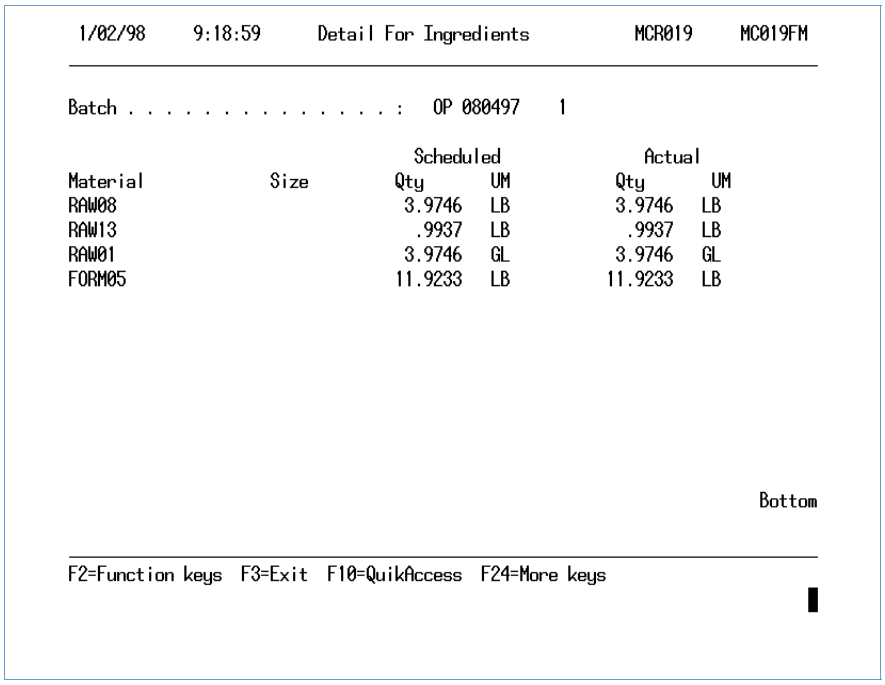


Figure 6-8: Display Batch screen 2

This screen displays the ingredients in the quantities applied to this order.

Displaying Product Requirements

Use this option to determine at what point you can promise delivery of products to your production facility. The system determines product requirement quantities using the following equation:

On Hand + Other Inventory + Supply – Demand

This option is identical to the *Display Available To Promise* option previously described, except that you establish the inventory types that make up each component for the product requirement equation in the Inventory Type file in the *Control Files* option in Infinium IC by your entries in the MPS column.

The *Display Product Requirements* option takes in to account supply and demand created by orders entered through Infinium OP, Infinium PM, and Infinium MC.

Use the menu path below.

- *Advanced Planning Report/Display*
  - *Display Product Requirements* [DPR]

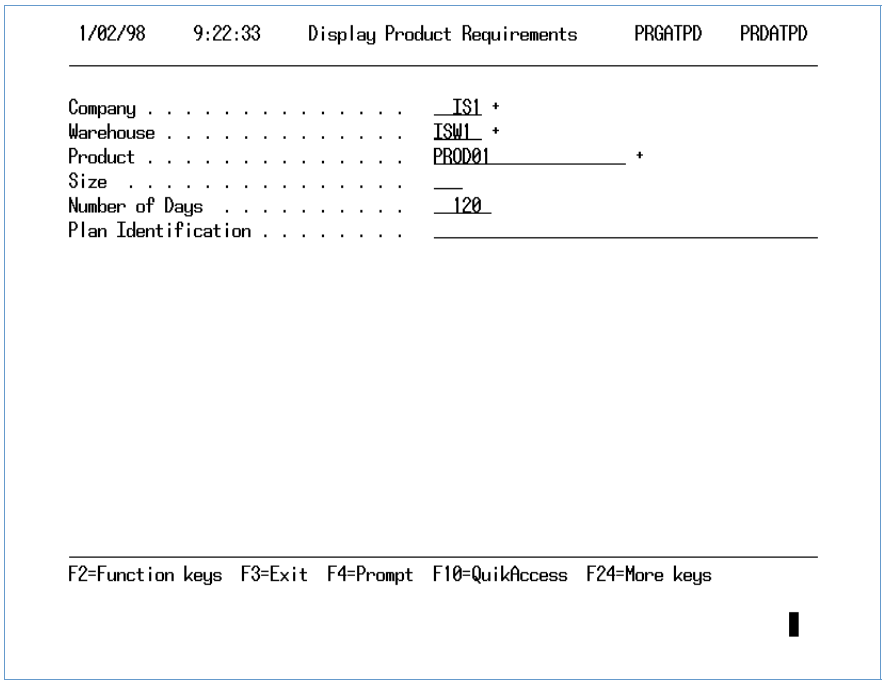


Figure 6-9: Display Product Requirements selection screen

The value in the *Number of Days* field defaults from the Infinium CA entity, company, or warehouse control files and determines how many days out from today's date the system calculates product requirements.

Product Requirements

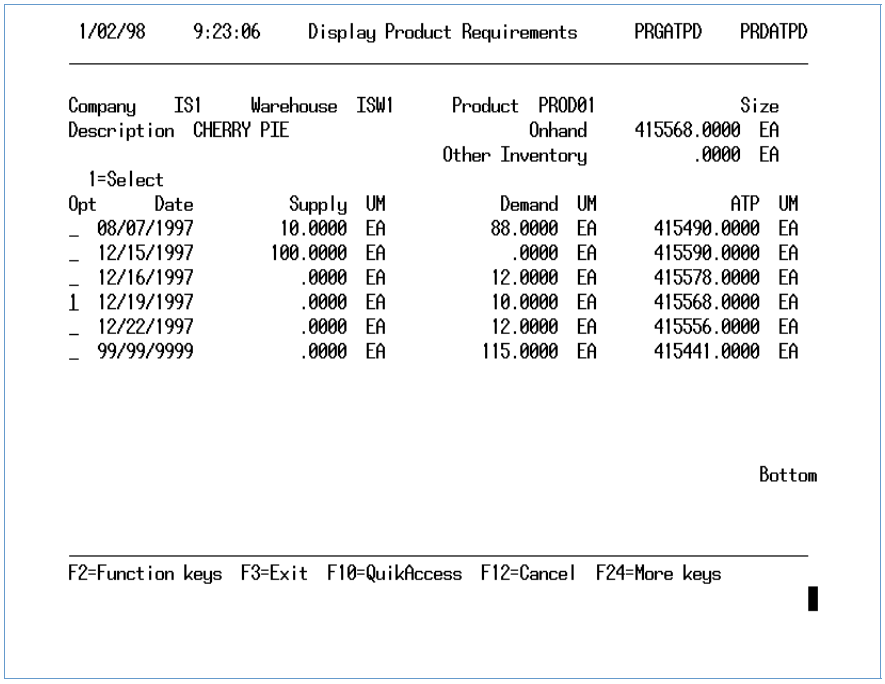


Figure 6-10: Display Product Requirements screen 1

From this screen press F21 to override the defaults which determine whether certain inventory types fall under the on hand, supply or demand categories. This override is only for this execution of the display.

MPS/MRP Overrides

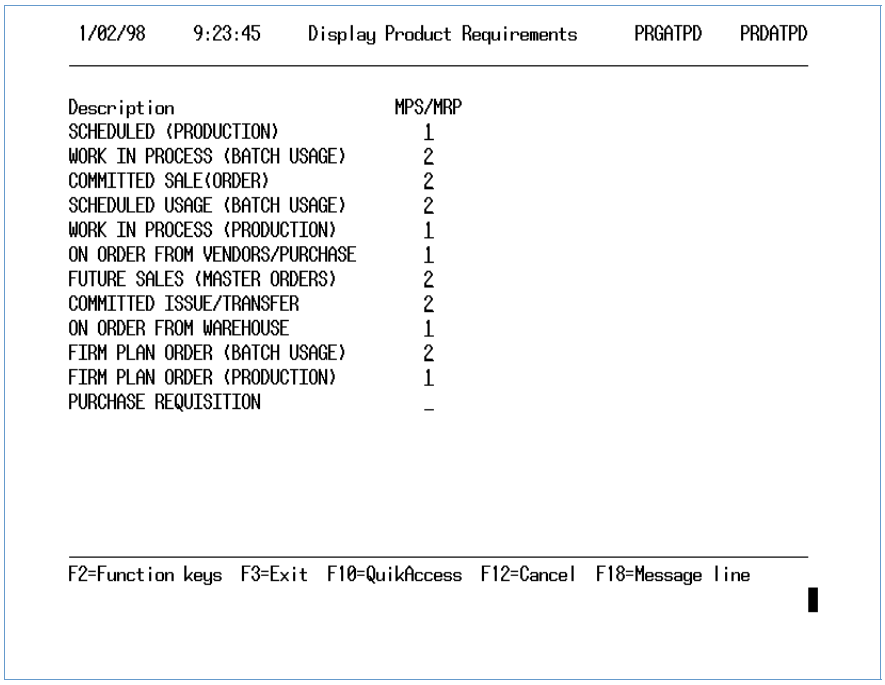


Figure 6-11: Display Product Requirements Override screen

Complete the *MPS/MRP* fields as follows:

- Leave the field blank to exclude any inventory type
- Type **1** to include inventory types in the supply total
- Type **2** to include inventory types in the demand total
- Type **3** to include inventory types in the other inventory total

Press Enter to return to the Display Product Requirements screen 1.

Displaying Product Requirements

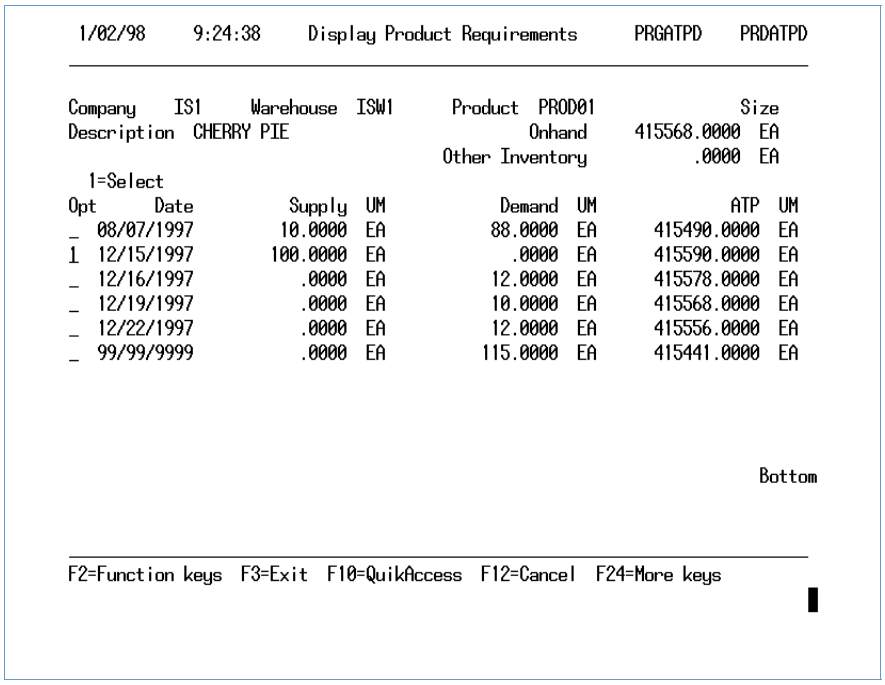


Figure 6-12: Display Product Requirements screen 1

When you return to the Display Product Requirements screen 1 shown above, the quantities reflect the changes. The changes you make are for this display only and do not affect the permanent settings.

Sometimes you have data with a date of 99/99/99. The quantity in the Demand column for the date 99/99/99 reflects the total of all open customer orders where the *Requested Delivery Date* or *Scheduled Ship Date* field is blank or production orders where the *Scheduled Production Date* field is blank.

The quantity in the Supply column for the date 99/99/99 reflects the total of all open production orders for the designated item where the *Scheduled Production Date* field is blank.

Type ***1*** in the *Opt* field next to any line to drill down to additional information detailing the production, purchase or sales orders that make up the supply or demand quantities.

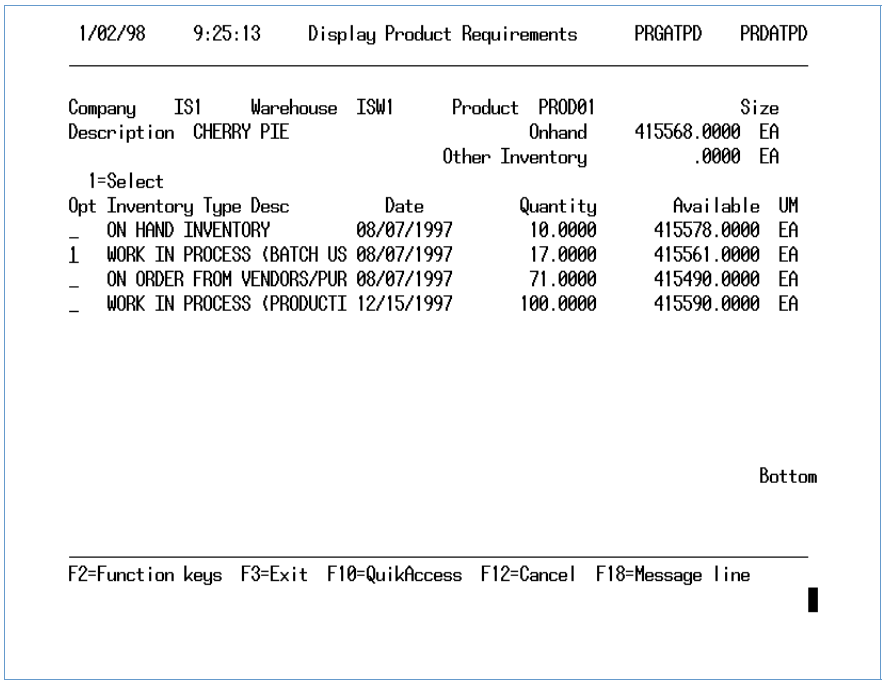


Figure 6-13: Display Product Requirements screen 2

This display includes the inventory types for all dates down to and including the date selected on the previous screen.

Type **1** in the *Opt* field to drill down to the next level of detail showing the specific orders making up the quantities for each inventory type.

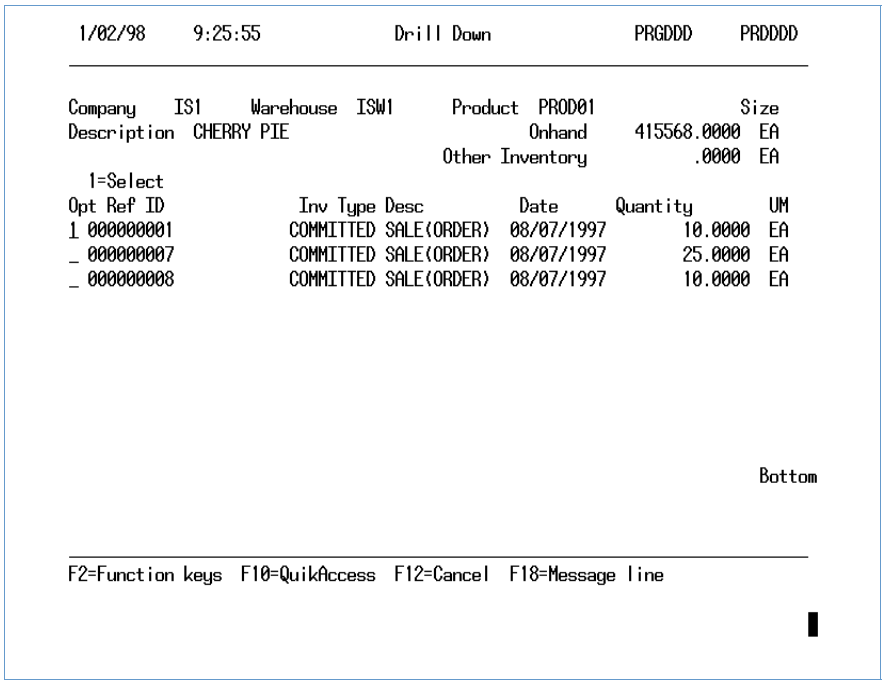


Figure 6-14: Display Product Requirements screen 3

The value the system displays in the Ref ID column is the Infinium MC batch number, the Infinium OP order number, or the Infinium PM purchase order number.

Type **1** in the *Opt* field next to the Ref ID for which you want to drill down to the next level displaying the order details. The system displays the open order display option from the system in which the order originated.

Working with Resource Load Summarization

The *Resource Load Summarization* option provides, in either display or report format, information about selected resources from either scheduled or in process batches in Infinium MC.

Information provided includes:

- Planned usage date
- Resource
- Resource description
- Scheduled quantity
- Daily capacity
- Percent utilization

You also have the option of writing the information to a work file which you can transfer to a personal computer for further processing.

Use the menu path below.

- *Advanced Planning Report/Display*
  - *Resource Load Summarization* [RLS]

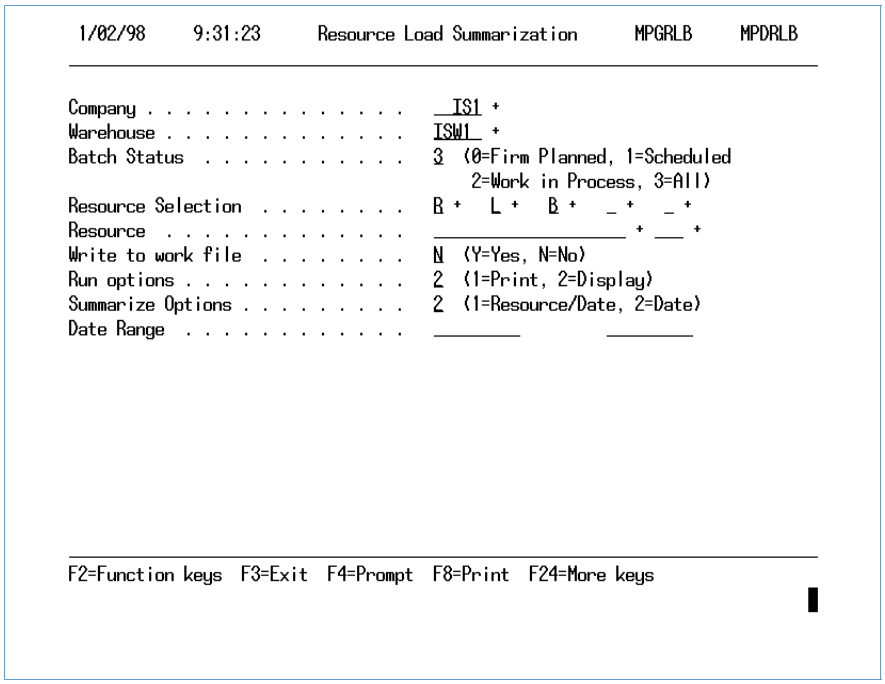


Figure 6-15: Resource Load Summarization prompt screen

The system requires entries in the *Batch Status, Write to work file, Run options,* and *Summarize Options* fields.

Leave the *Resource Selection* and *Resource* fields blank to include all resources on the display or report.

You can display the information provided by this option or you can print the Resource Load Summarization report.

Type **2** in this field to display the information, beginning with the screen on the following page.

To print the report, type **1** in the *Run options* field and press F8. A sample report is in the “Infinium MP Reports” appendix.

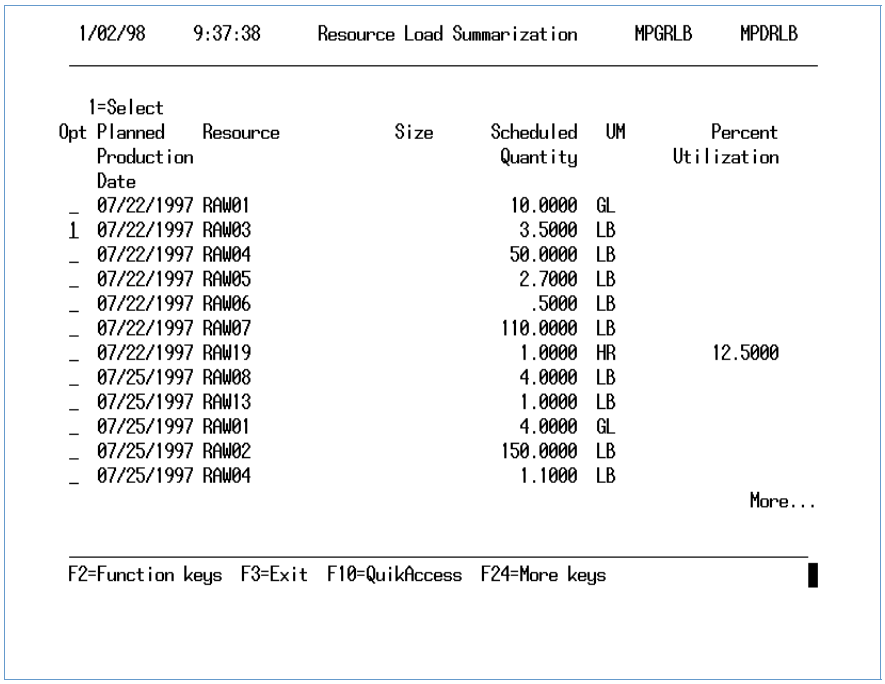


Figure 6-16: Resource Load Summarization screen 1

The system calculates the *Percent Utilization* field value by dividing the Scheduled Quantity by the Daily Capacity. Specify the daily capacity for the resource in the General Information attribute of the *Work with Item Warehouse* option in Infinium IC.

Type any character in the *Opt* field and press Enter to drill down to the next level of detail for any resource listed.

Press F11 to display the resource description.

The *Daily Capacity* field replaces the *Scheduled Quantity* field on this screen when you press F20 (Window Right). Press F19 (Window Left) to return to the *Scheduled Quantity* field.

Resource Load Summarization Drill Down

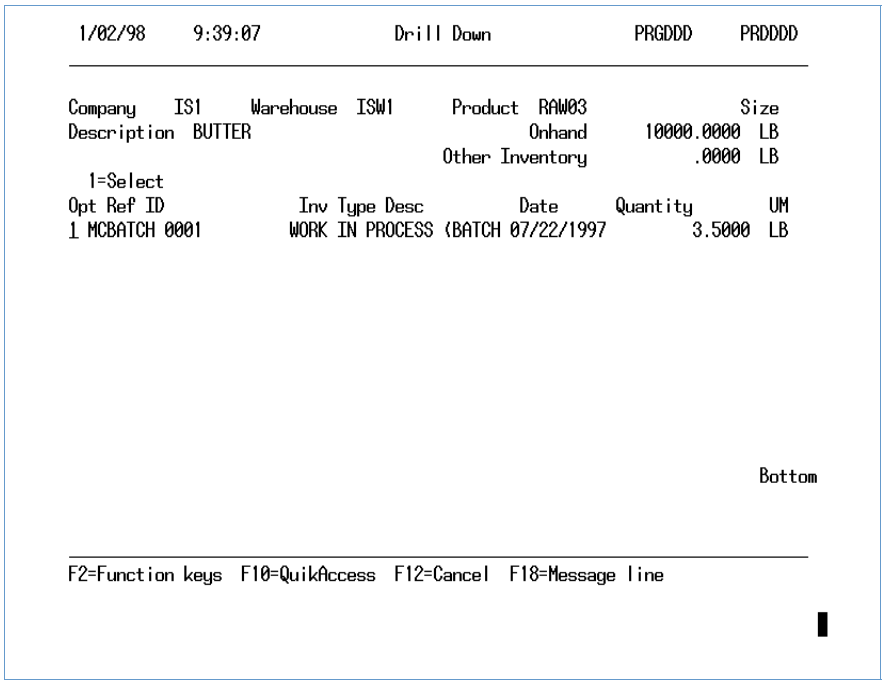


Figure 6-17: Drill Down screen

Type **1** in the *Opt* field and press Enter to drill down to the next level of detail for any Ref ID listed. The system displays the open order display option from the system in which the order originated.

For this example, the following screens are from Infinium MC.

Batch Information

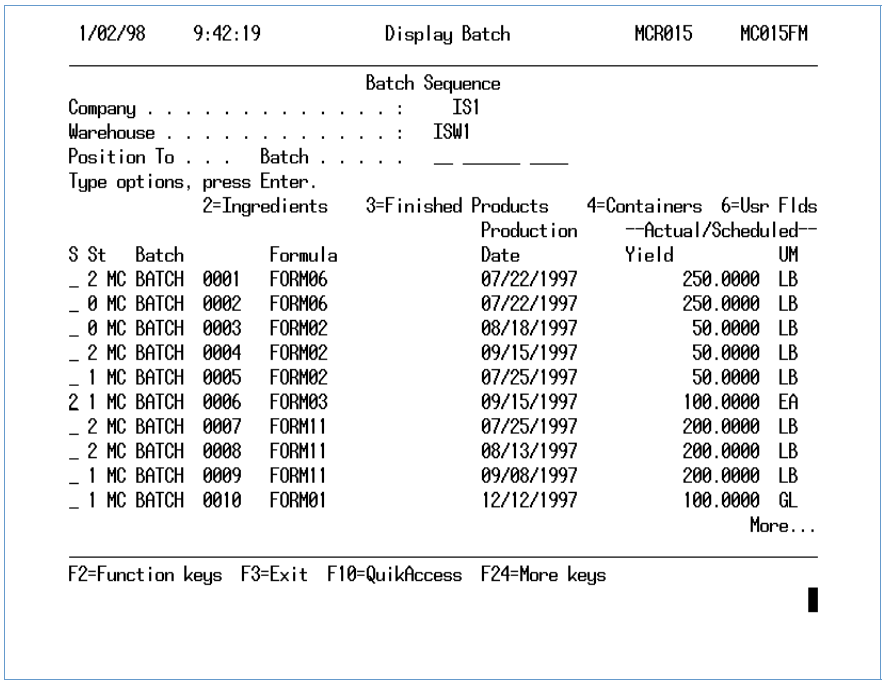


Figure 6-18: Display Batch screen

Type **2** in the *S* field and press Enter to display a list of the batch ingredients.

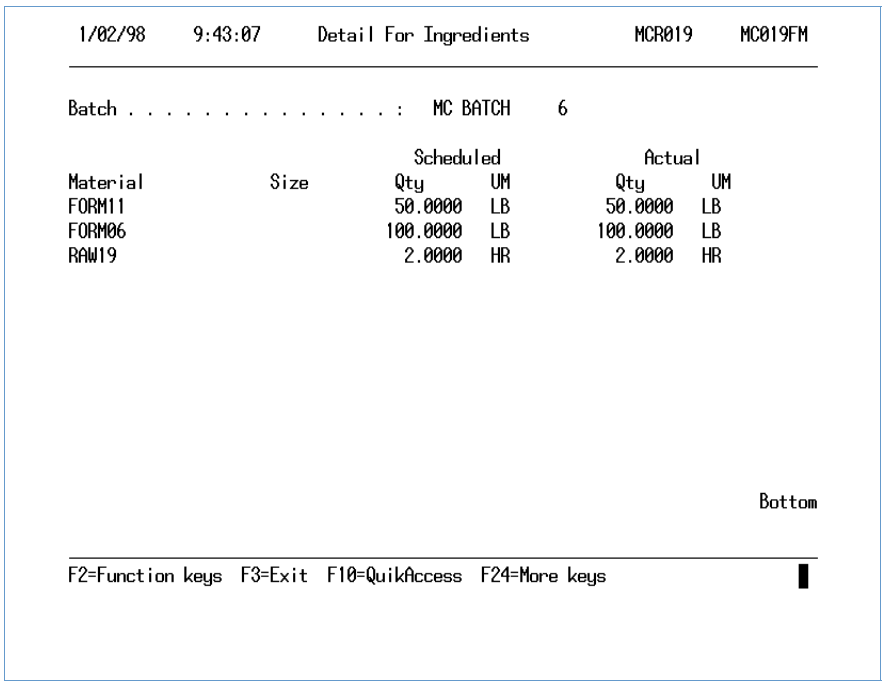


Figure 6-19: Detail for Ingredients screen

Displaying Action Messages

Use this option to display action messages created when you generate the MPS and MRP. These messages prompt you to create new purchase or manufacturing orders. You can also use this option to plan changes to existing orders to bring the receipts into phase with the requirements.

Use the menu path below.

- *Advanced Planning Report/Display*
  - *Display Action Messages* [DAM]

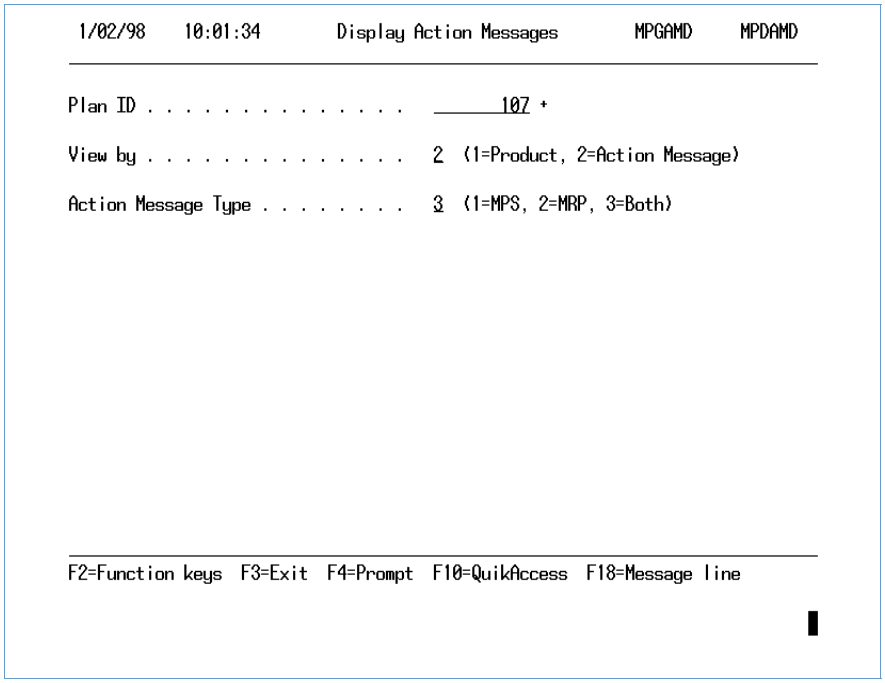


Figure 6-20: Display Action Messages prompt screen

Complete all of the fields on this screen and press Enter to display action messages. Use the *View by* field to sort your display. You also can utilize the *Action Message Type* field to only view action messages generated by MPS or MRP.

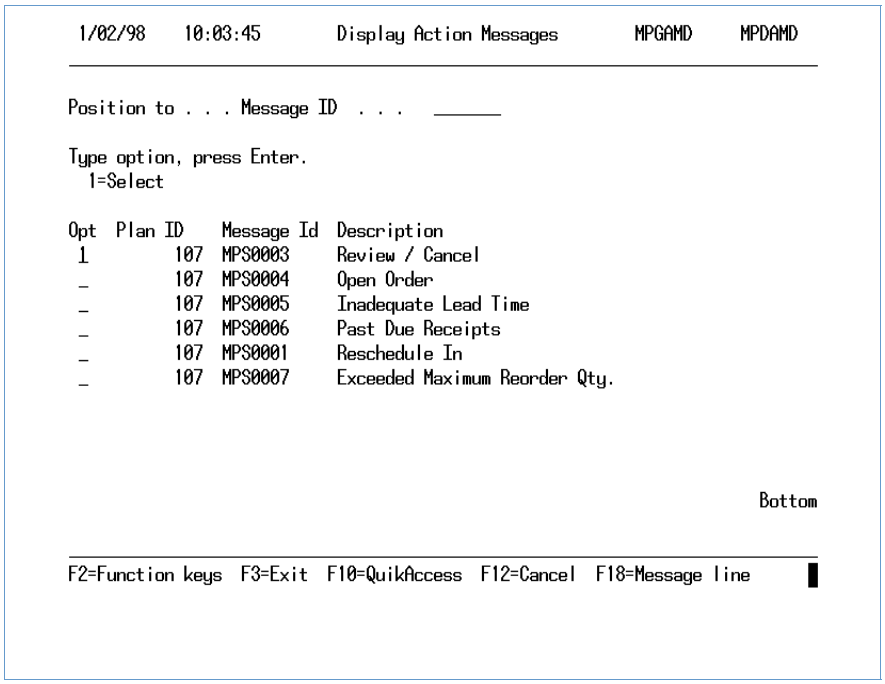


Figure 6-21: Display Action Messages selection screen

This screen displays when you press Enter from the Display Action Messages prompt screen. This screen lists by product or action message, the action messages created when you generate the MPS, MRP, or both depending on your entries on the previous screen. Select a product or action message and then press Enter to view further information.

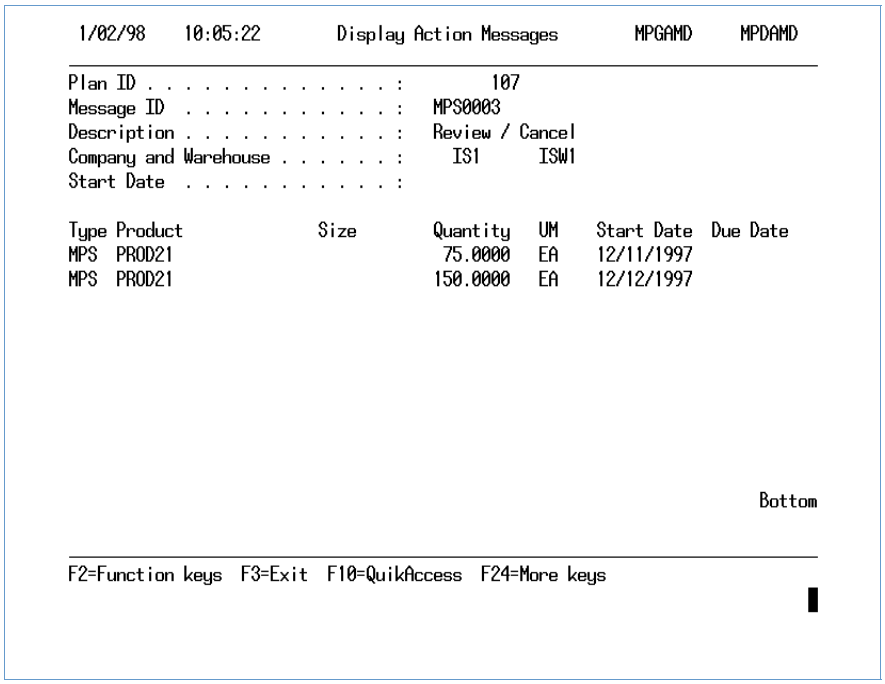


Figure 6-22: Display Action Messages screen

This screen displays when you select an action message and press Enter from the Display Action Messages selection screen. Use this information to create or adjust purchase orders and manufacturing batches.

Notes

Part 7
Purging Information

7

The part consists of the following topics:

Overview of Purging Information

Infinium MP provides several purge options to assist in cleaning up files and creating disk space.

After you complete this part, you should be able to purge details from:

- Material Requirements Plans
- Master Production Schedules
- Rough Cut Capacity information
- Forecasts
- Action Messages

You should also be able to reset the Infinium MP batch identifier.

Purging Plans

After you have used your plans, use this option to delete the plan detail information to make room for future MPS/MRP plans. When you purge a MPS/MRP plan, the system saves the selection criteria so you can generate the plan again at a later date.

Use the menu path below.

- *Utilities*
  - *Purge MPS/MRP Plans* [PMPSMRPP]

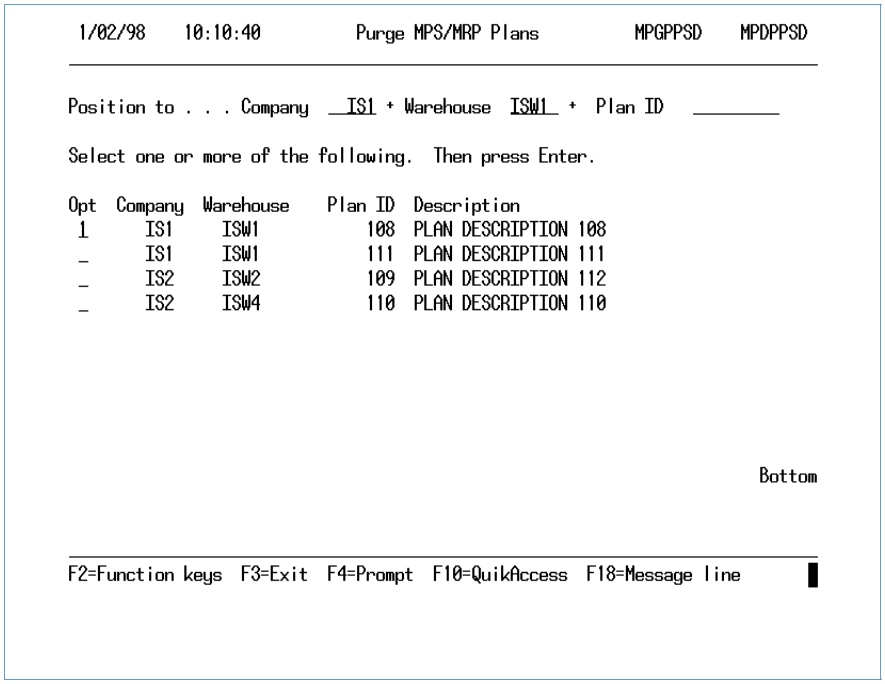


Figure 7-1: Purge MPS/MRP Plans selection screen

To sort the list of existing plans, complete the *Company*, *Warehouse*, or *Plan ID* fields. Type any character beside the plan or plans to purge and then press Enter.

Confirming Purging MPS/MRP Plans

This screen displays after you select a plan from the Purge MPS/MRP Plans selection screen.

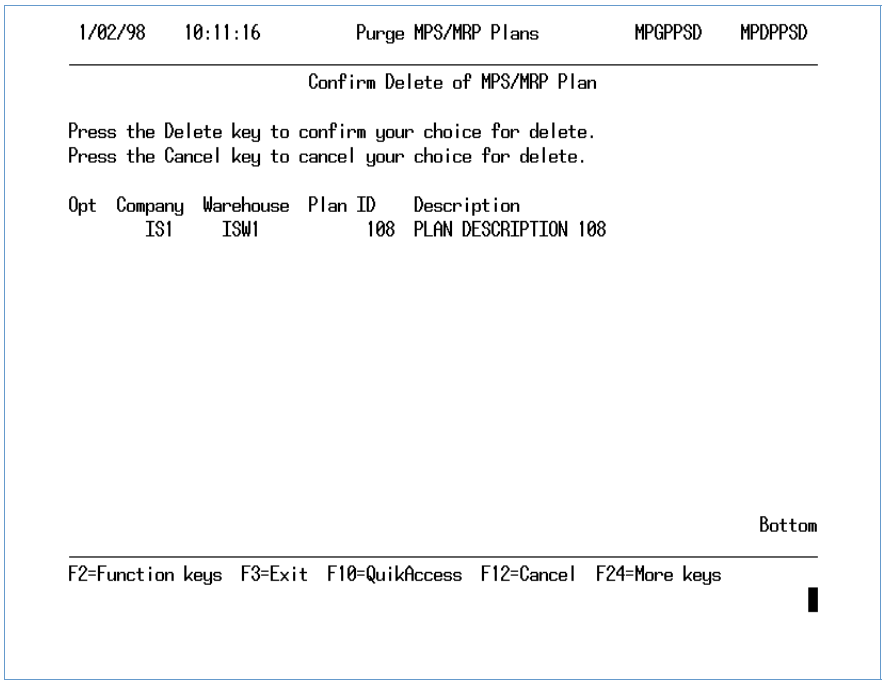


Figure 7-2: Purge MPS/MRP Plans screen

Press Enter to complete the purge or press F12 to cancel.

Purging Rough Cut Capacity Information

Use this option to purge rough cut capacity information from the system.

Use the menu path below.

- *Utilities*
  - *Purge Rough Cut Capacity* [PRCC]

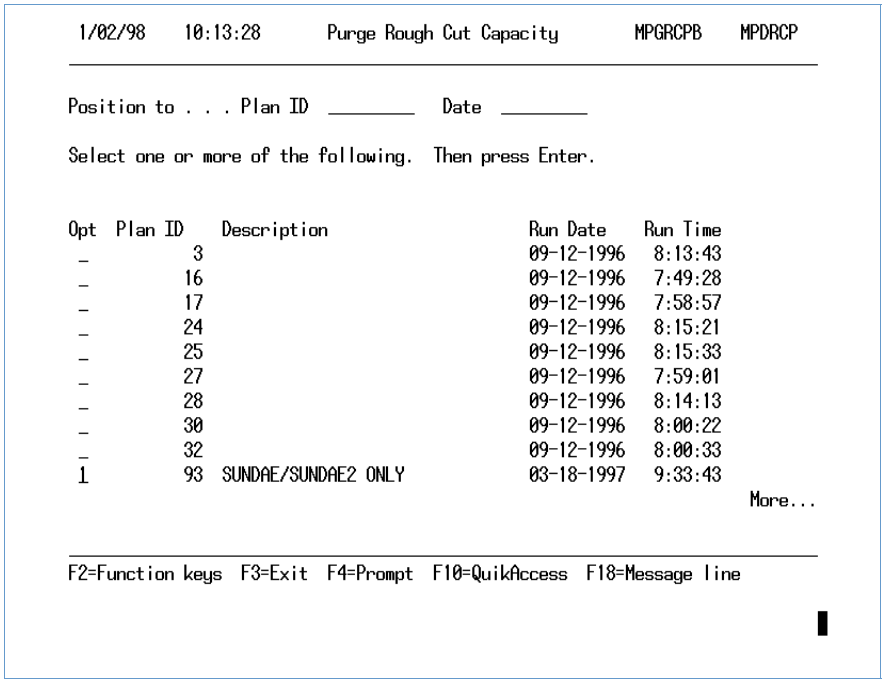


Figure 7-3: Rough Cut Capacity Purge selection screen

Type any character to select the plan or plans that the system should purge and then press Enter .

Confirming the Rough Cut Capacity Purge

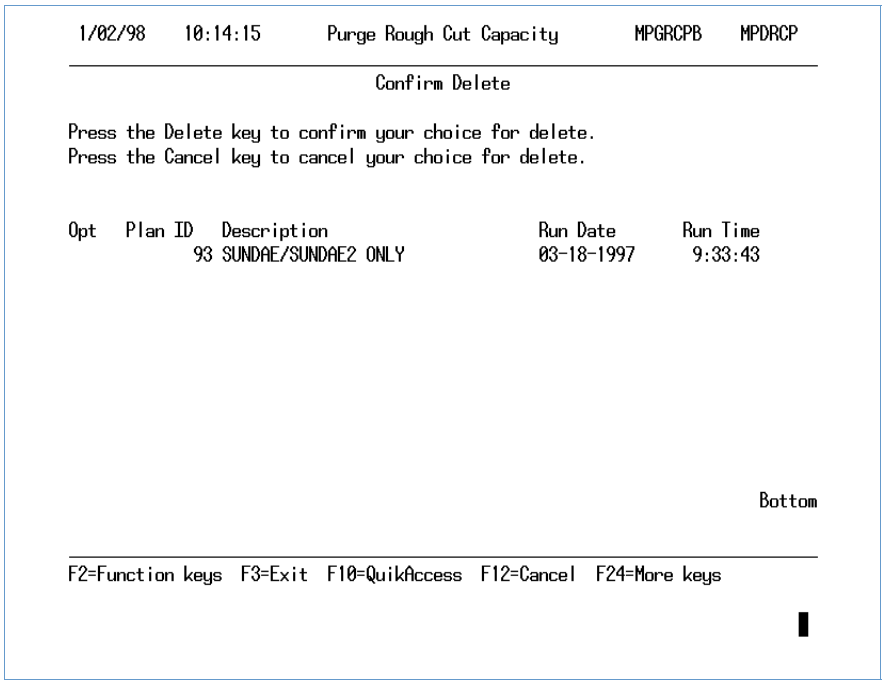


Figure 7-4: Rough Cut Capacity Confirmation screen

To accept the conditions of this purge, press F22. To cancel the purge, press F12.

Purging Forecasts

Use this option to purge records from the Forecast file.

Use the menu path below.

- *Utilities*
  - *Purge Forecast* [PF]

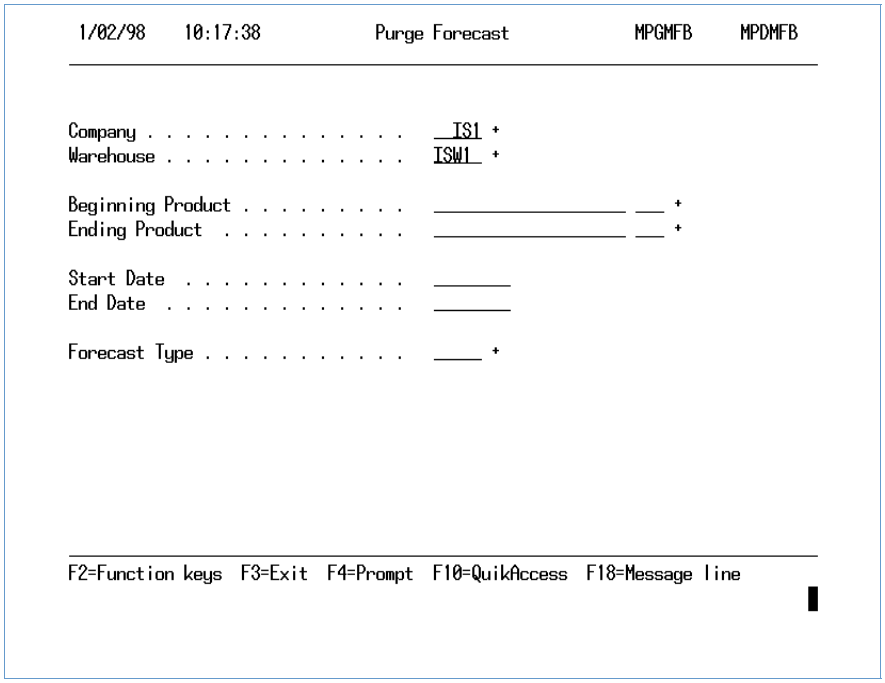


Figure 7-5: Purge Forecast selection screen

Define the parameters of the forecast purge using this screen. You can purge by company, warehouse, product range, date, or forecast type. The only required field is the *Company* field.

To purge records for all warehouses within one company, press FieldExit on the *Warehouse* field.

To purge records for only one product, complete the *Beginning Product* field and the *Size* field, if applicable.

To purge records for one day, complete only the *Start Date* field.

Press Enter once you complete this screen to access the Forecast Purge Confirmation screen.

Confirming the Forecast Purge

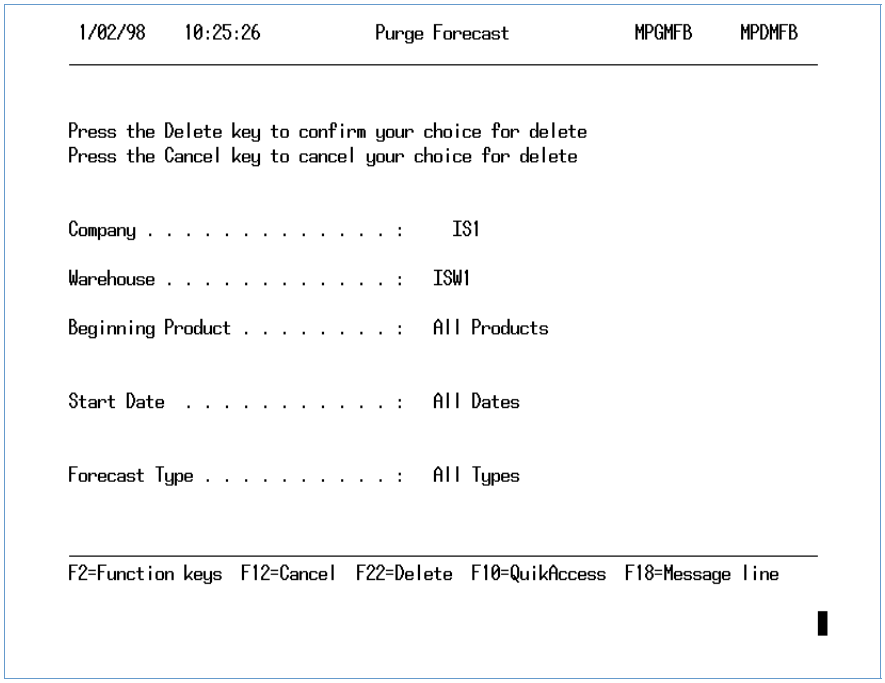


Figure 7-6: Purge Forecast Confirmation screen

To accept the conditions of this purge, press F22 and to cancel the purge press F12 . If you press F22, the system returns you to the Purge Forecast selection screen. You can submit a purge for another forecast type or warehouse from the Purge Forecast selection screen.

Once you press F3, the system submits the purge job. Also, before the system can perform the purge, all users must be out of the *Work with Forecast Description* and *Work with Forecast* options. If you submit the job when a user is in either of these options, the system sends a message to the system operator and resubmits the job to batch. The system then terminates the first job.

Purging Action Message History

This option displays all plan identifiers that have action message audit trails. The run dates and times of these plans display on the screen.

Use the menu path below.

- *Utilities*
  - *Purge Action Message Audit File* [PAMAF]

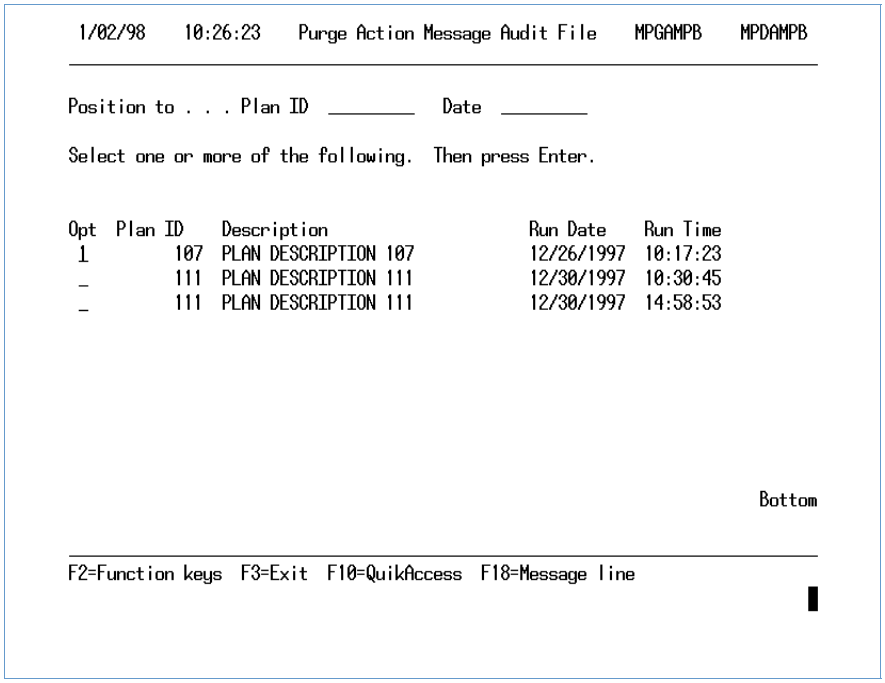


Figure 7-7: Purge Action Message Audit File selection screen

To select a plan for the purge, type **1** beside it and press Enter. Once the system submits the job, **PURGED** displays beside the records selected for purging.

Resetting the Batch Number

Use this option to reset the batch number in Infinium MP. This only affects batch numbers created by Infinium MP.

Use the menu path below.

- *Utilities*
  - *Reset Manufacturing Batch Number* [RMBN]

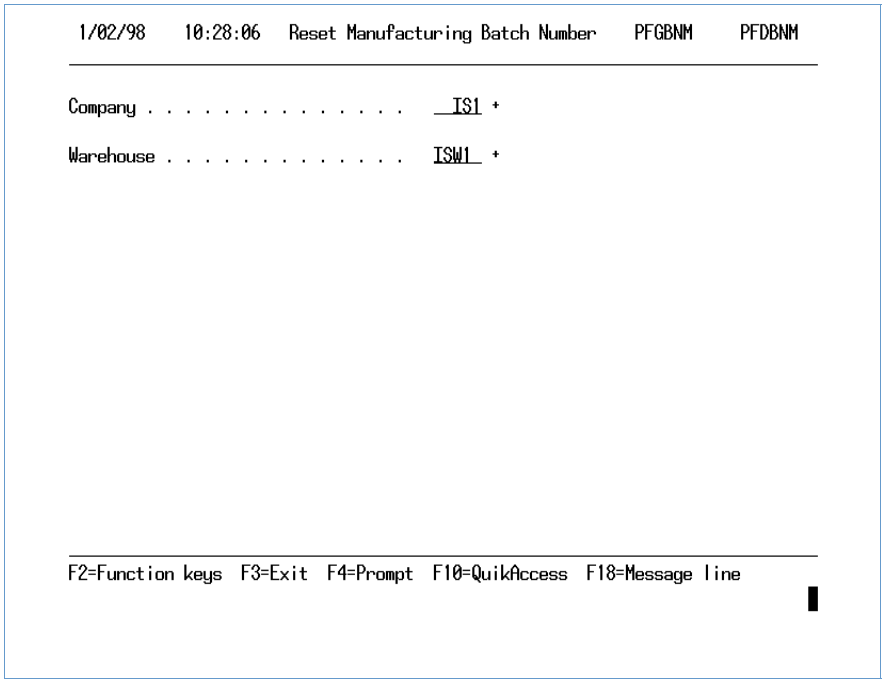


Figure 7-8: Reset Manufacturing Batch Number screen

After you type the appropriate values in the *Company* and *Warehouse* fields, press Enter.

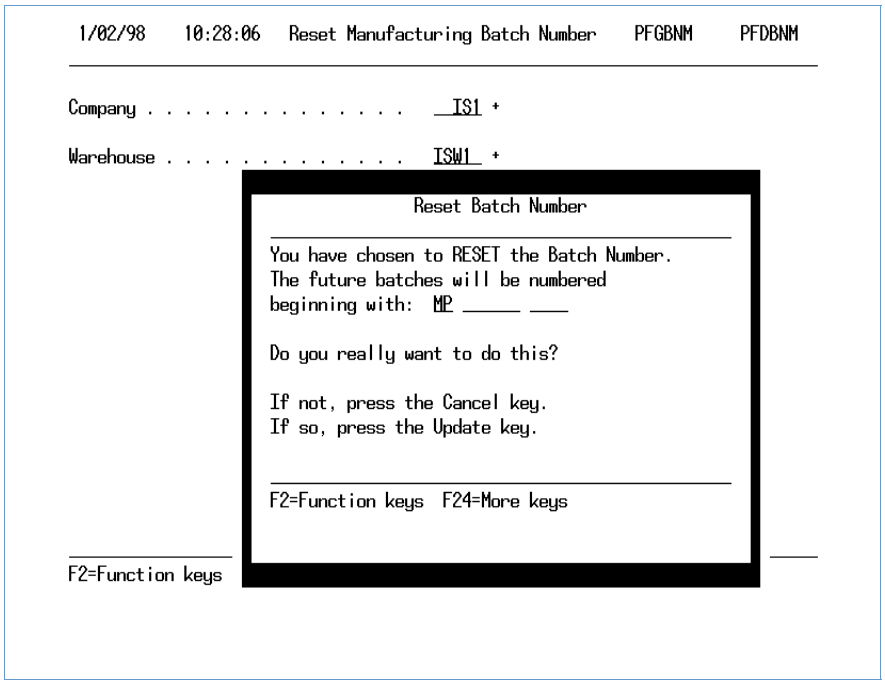


Figure 7-9: Reset Batch Number Verification window

Type the new batch identifier in the *Reset Batch Number* field. Press Enter to reset or F12 to cancel.

Notes

Appendix A
Infinium MP Reports

The part consists of the following topics:

Printing the Master Production Schedule

Use this option to print the Master Production Schedule.

Use the menu path below.

- *Master Production Scheduling*
  - *MPS Generation Selection* [MPSGS]

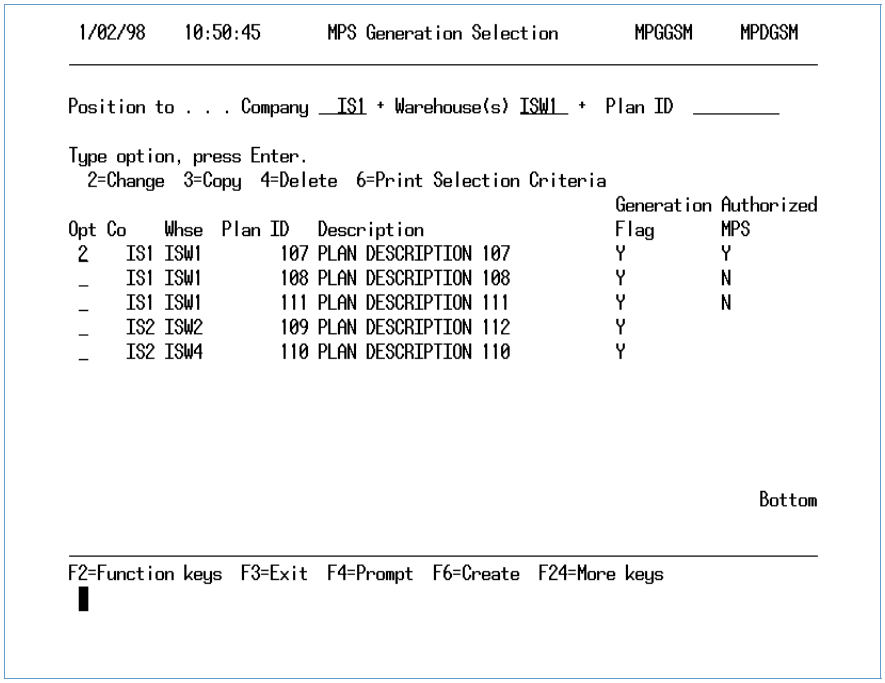


Figure A-1: MPS Generation selection screen

Complete the screen as described in the “Master Production Scheduling” part.

```
MPGMSPP    MPTMSP                    M A S T E R   P R O D U C T I O N   S C H E D U L E              PAGE    1  11/02/01  4:03:02 PJT
-------------------------------------------------------------------------------------------------------------------------------------
 Company    S2K  Warehouse  S2KW1
 Product  S2KMFGP1      GL     MFG PRODUCT #1
 Plan Identifier         2     PLAN FOR S2K'S WAREHOUSE 1     Plan Date  11/02/2001              Planner
                                                                                                  Product Family
 Starting Inventory         20.0000  Inventory Unit of Measure     GL                                  Buyer
 Safety Stock                        Lead Time                     9.00   Lot Size    500.0000     Lot Size Technique       Lot-for-lot
 Order Multiple Quantity   250.0000     Minimum Quantity                    200.0000
 Time Fence 1   Description  DO NOT MAKE CHANGES             Period Cutoff        3  Consumption Rule  2 Customer Orders
 Time Fence 2   Description  KEEP CHANGES TO A MINIMUM       Period Cutoff        6  Consumption Rule  3 Greater of Cust Ord/Forecast
 Time Fence 3   Description  ANYTHING GOES                                          Consumption Rule  1 Forecast
 Action Message Period Cutoff   10    Pegging Cutoff Days  90


                PAST DUE 10/02/2001 10/03/2001 10/04/2001 10/05/2001 10/06/2001 10/09/2001 10/16/2001 10/23/2001 10/30/2001 12/13/2001
                             1          2          3          4          5          6          7          8          9         10


Forecast                   50.0000    25.0000    75.0000   100.0000   150.0000   150.0000   100.0000   150.0000   275.0000   20.0000
Orders                    100.0000    50.0000                          3.0000    44.0000    58.0000    45.0000    23.0000
Receipts        54.0000   100.0000    54.0000   108.0000    54.0000    54.0000    65.0000
Usage
Firm Pld Orders                       54.0000    54.0000                                                 165.0000
Available       74.0000    74.0000   132.0000   294.0000   194.0000   98.0000                           15.0000
Plan ATP                   74.0000    58.0000   162.0000              51.0000     8.0000     42.0000   120.0000    237.0000   20.0000
Suggested MPS                                                                   52.0000     46.0000               197.0000   20.0000
 -----------------------------------------------------------------------------------------------------------------------------------
ACTION MESSAGES
Message Id Description                                Quantity     UM      Start Date    Due Date
   MPS0002    Reschedule Out                          54.0000     GL      10/06/2001    10/09/2001
   MPS0005    Inadequate Lead Time                    52.0000     GL       9/26/2001    10/09/2001
   MPS0005    Inadequate Lead Time                    46.0000     GL      10/03/2001    10/16/2001
   MPS0006    Past Due Receipts                       54.0000     GL
-------------------------------------------------------------------------------------------------------------------------------------
RECEIPTS                                                                  REQUIREMENTS
VENDOR       DUE      ORDER NUMBER       QUANTITY     DETAIL       REQUIRED    REQUIRED   CUSTOMER NUMBER    ORDER NUMBER  DETAIL
NUMBER       DATE                        DUE          WAREHOUSE    DATE        QUANTITY                                     WAREHOUSE

           9/26/2001  PPSEPT970001       54.0000     S2KW1        10/02/2001   100.0000  1                 000000037     S2KW1
          10/02/2001  PPOCT97 0018      100.0000     S2KW1        10/02/2001    50.0000                    FTYP1         S2KW1
          10/03/2001  PPOCT97 0012       54.0000     S2KW1        10/03/2001    50.0000  1                 000000038     S2KW1
                                                                   10/03/2001    25.0000                    FTYP1         S2KW1
          10/04/2001  PPOCT97 0001       54.0000     S2KW1
          10/04/2001  PPOCT97 0002       54.0000     S2KW1        10/04/2001    75.0000                    FTYP1         S2KW1

                                                  ********** E N D  O F  R E P O R T **********
```

Printing the MPS Exception Reports

Use this option to create an exception report on a MPS that you generated using the *MPS Generation Selection* option.

Use the menu path below.

- *Master Production Scheduling*
  - *MPS Exception Reporting* [MPSER]

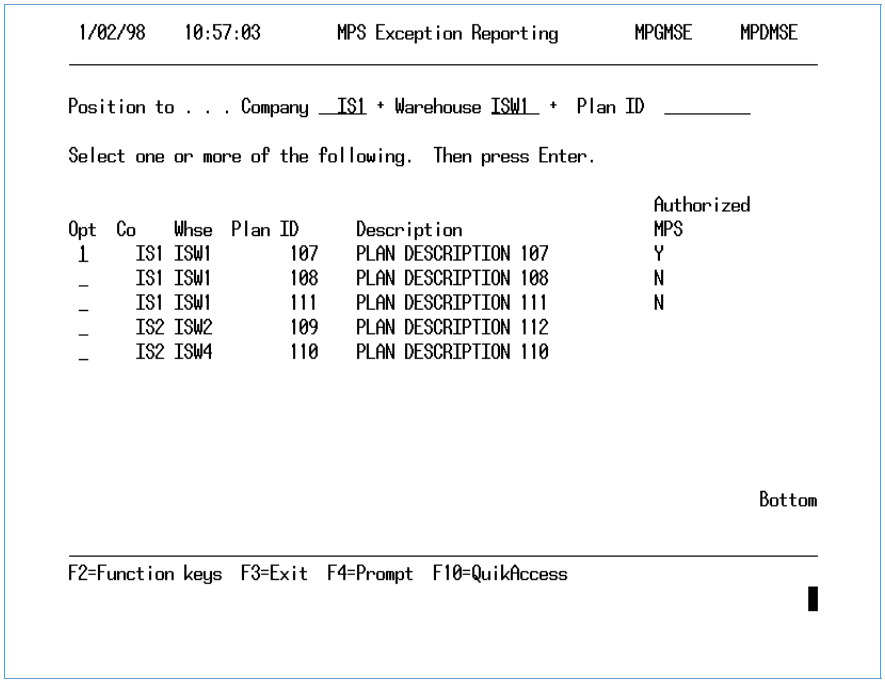


Figure A-2: MPS Exception Reporting selection screen

Only generated Plan IDs display on this screen.

Type any character in the *Opt* field to select one or more Plan IDs to include on the report. After selecting the plans, press Enter to continue to the next screen.

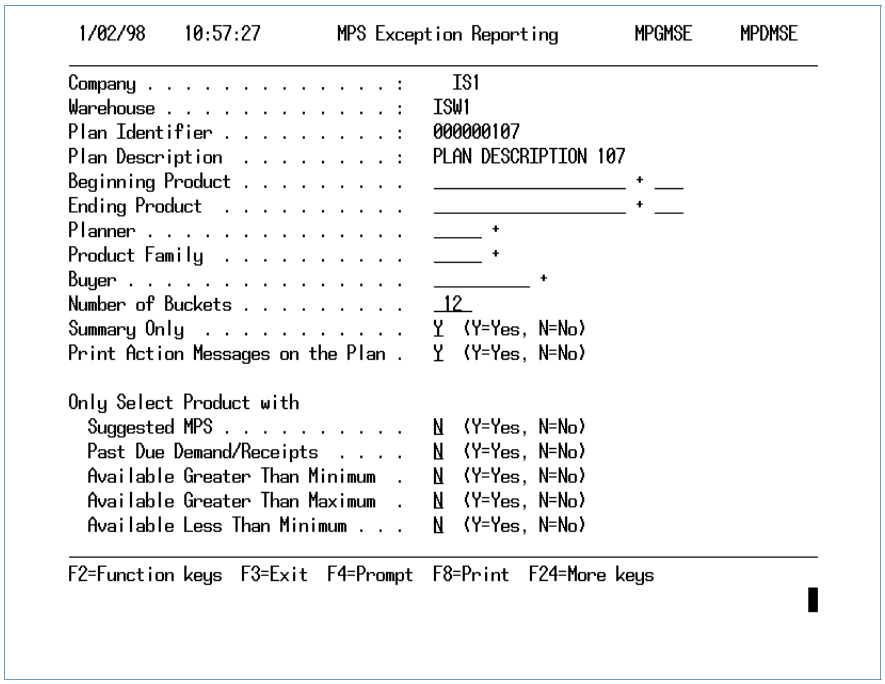


Figure A-3: MPS Exception Reporting screen

Type the criteria you want to use in generating this report in the fields above.

Under the caption *Only Select Product with*, select one or more options.

Press F11 to change the display from product selection to formula selection.

The MPS Exception report and the Master Production Schedule report refer to the same listing. Refer to the Master Production Schedule printout.

Printing the Material Requirements Selection Report

Use this option to generate the Material Requirements Selection report, the Production Budgeting report, and the Zero Cost Exception report.

Use the menu path below.

- *Material Requirements Planning*
  - *MRP Generation Selection* [MRPGS]

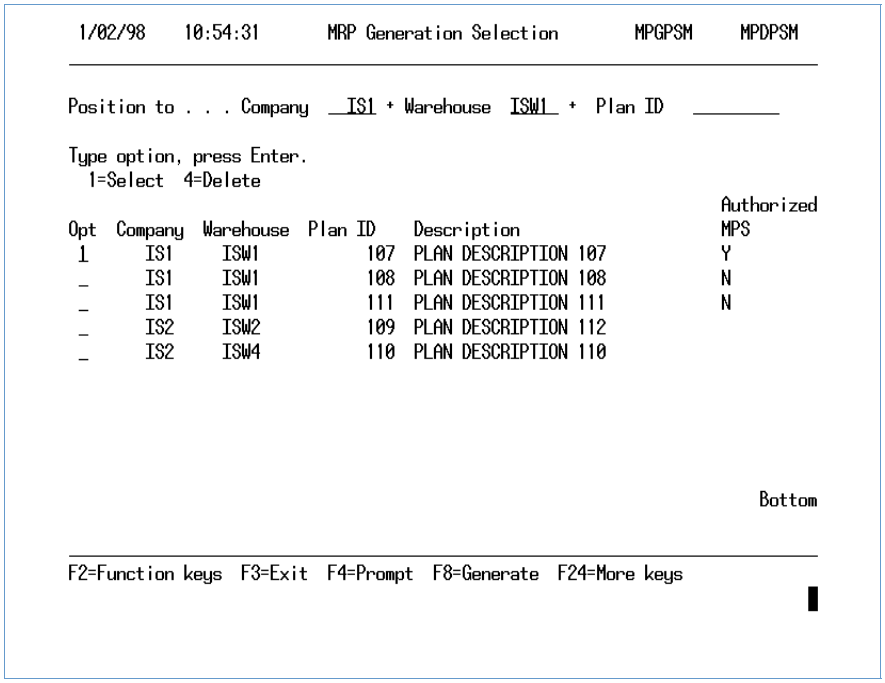


Figure A-4: MRP Generation Selection selection screen

To generate an MRP, type **1** in the *Opt* field next to the plan you want to process and press F8.

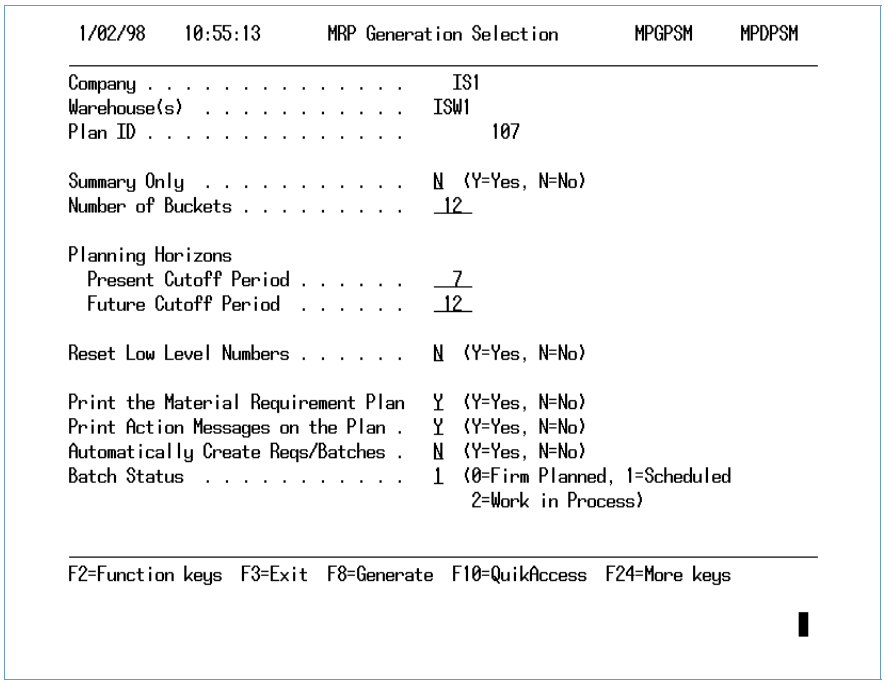


Figure A-5: MRP Generation Selection screen

Complete fields as described in the “Working with Material Requirements Planning” part.

The system generates the report after you press F8.

An example of the Material Requirements Selection report follows.

```
MPGMRER    MPTMRR                  M A T E R I A L   R E Q U I R E M E N T S   P L A N   S E L E C T I O N                PAGE    1
11/21/01   15:55:37                                                                                                          PJT
-------------------------------------------------------------------------------------------------------------------------------
 Company    S2K  Warehouse      S2KW1
 Product  RAW11                        PROCESS RAW MATERIAL-water
 Plan Identifier                 2     PLAN FOR S2K'S WAREHOUSE 1              Plan Date              11/03/2001
 Planner
 Starting Inventory       542.0168     Inventory Unit of Measure  GL
 Safety Stock                          Lead Time                   4.00  Lot Size     1000.0000    Lot Size Technique  1     Lot-for-lot
 Order Multiple Quantity  100.0000     Minimum Quantity          500.0000 Maximum Quantity
 Action Message Cutoff Period   10     Pegging Cutoff Days            90
 Planning Horizons:                    Present Cutoff Period            Future Cutoff Period

                PAST DUE 10/02/2001 10/03/2001 10/04/2001 10/05/2001 10/06/2001 10/09/2001 10/16/2001 10/23/2001 10/30/2001 12/13/2001
                               1          2          3          4          5          6          7          8          9         10
Independent Demand  35.5557  101.3997   142.2228   58.0865    35.5557              91.7487
Dependent Demand                                             37.0224    37.0224
Receipts
Projected Available 470.9054 369.5057   222.4133  127.3044    91.7487    91.7487
Projected Onhand    506.4611 405.0614   225.8162  130.7073    97.1516    97.1516     3.4029     3.4029     3.4029     3.4029    3.4029
Planned Order Receipt                                                              32.1528
Planned Order Release                    32.1528
-------------------------------------------------------------------------------------------------------------------------------

ACTION MESSAGES
 Message Id  Description                              Quantity     UM      Start Date    Due Date
-------------------------------------------------------------------------------------------------------------------------------

RECEIPTS                                                                    REQUIREMENTS
 VENDOR        DUE    ORDER NUMBER     QUANTITY    DETAIL      REQUIRED     REQUIRED      CUSTOMER NUMBER    ORDER NUMBER        DETAIL
 NUMBER        DATE                    DUE         WAREHOUSE   DATE         QUANTITY                                            WAREHOUSE
                                                                 9/25/2001     35.5557     PPSEPT970001                          S2KW1
                                                               10/02/2001      35.5557     PPOCT97 0008                          S2KW1
                                                               10/02/2001      65.8440     PPOCT97 0018                          S2KW1
                                                               10/03/2001      35.5557     PPOCT97 0009                          S2KW1
                                                               10/03/2001      35.5557     PPOCT97 0001                          S2KW1
                                                               10/03/2001      35.5557     PPOCT97 0002                          S2KW1
                                                               10/03/2001      35.5557     PPOCT97 0012                          S2KW1
                                                               10/03/2001     296.1792     Planned                               S2KW1
                                                               10/04/2001      51.8607     MX1004970001                          S2KW1
                                                               10/04/2001     296.1792     Planned                               S2KW1
                                                               10/05/2001      35.5557     PPOCT97 0003                          S2KW1
                                                               10/10/2001      35.5557     PPOCT97 0004                          S2KW1
                                                               10/11/2001      35.5557     PPOCT97 0013                          S2KW1
                                                               10/13/2001     171.9088     MX1004970011                          S2KW1
                                                                          **********   E N D   O F   R E P O R T   **********
```

Printing the Material Requirements Exception Report

Use this option to create an exception report on a MRP you generated using the *MRP Generation Selection* option.

Use the menu path below.

- *Material Requirements Planning*
  - *MRP Exception Reporting* [MRPER]

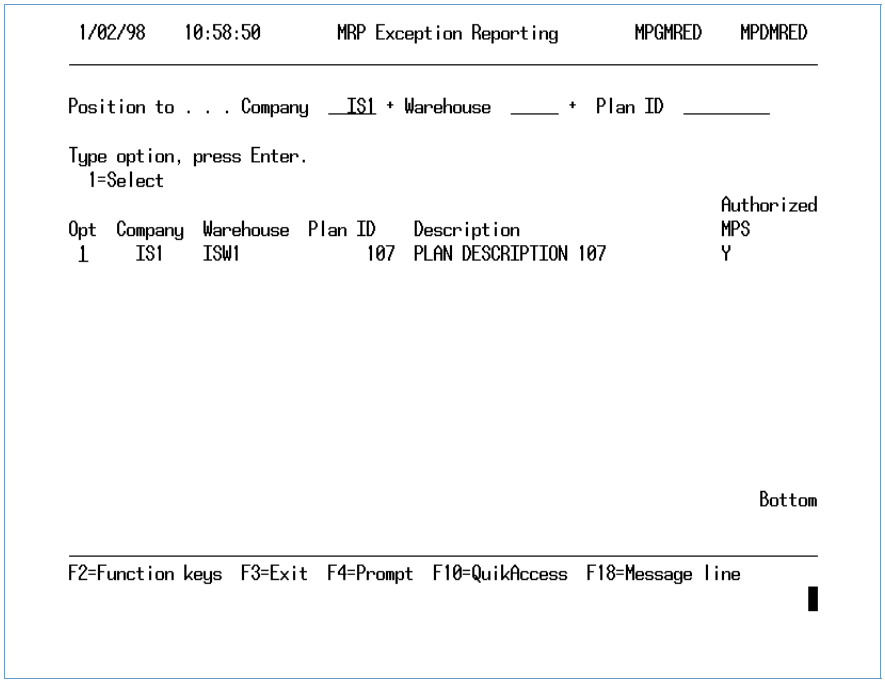


Figure A-6: MRP Exception Reporting selection screen

Only generated Plan IDs display on this screen. Type any character in the *Opt* field to select one or more Plan Ids to include on the report.

Under the caption *Only Select Product with*, select one or more options.

Press F11 to change the display from product selection to formula selection.

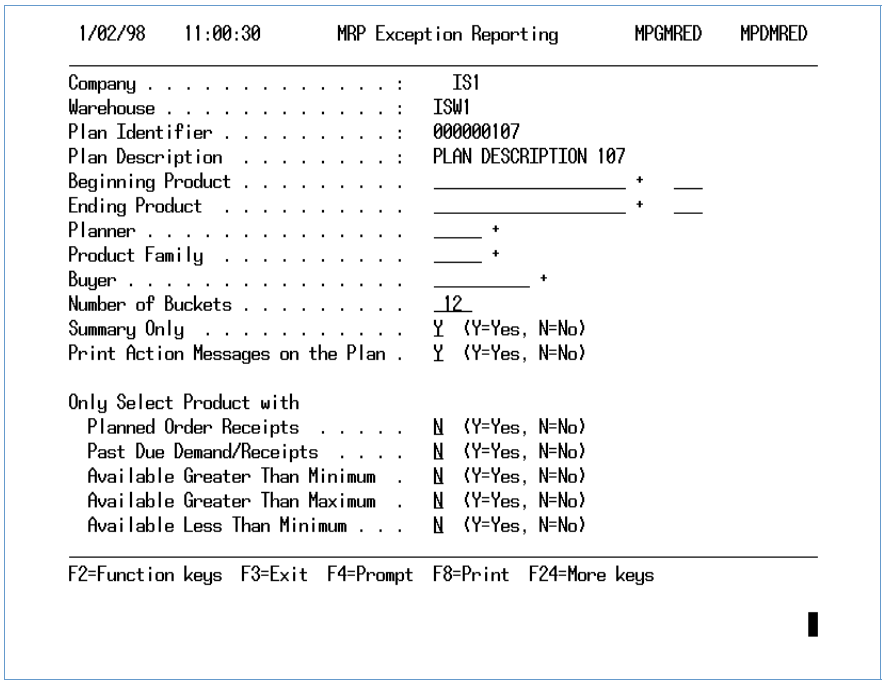


Figure A-7: MRP Exception Reporting screen

Type the criteria you want to use in generating this report in the fields above.

The system generates the report after you press F8.

Under the Only Select Product with column, select one or more options.

The MRP Exception report and the Material Requirements Plan Selection report refer to the same listing.

Printing the Product Requirements Report

The Product Requirements report identifies the periodic supply and demand of raw materials and/or products.

The factors affecting supply include purchasing and manufacturing orders. Those affecting demand include customer and manufacturing orders. For each raw material/resource and product you select, the report provides required quantities for the periods you specify for each type of supply and demand, a net total for each period, and a net total for all periods.

Use the menu path below.

- *Advanced Planning Report/Display*
  - *Product Requirement Report* [PRR]

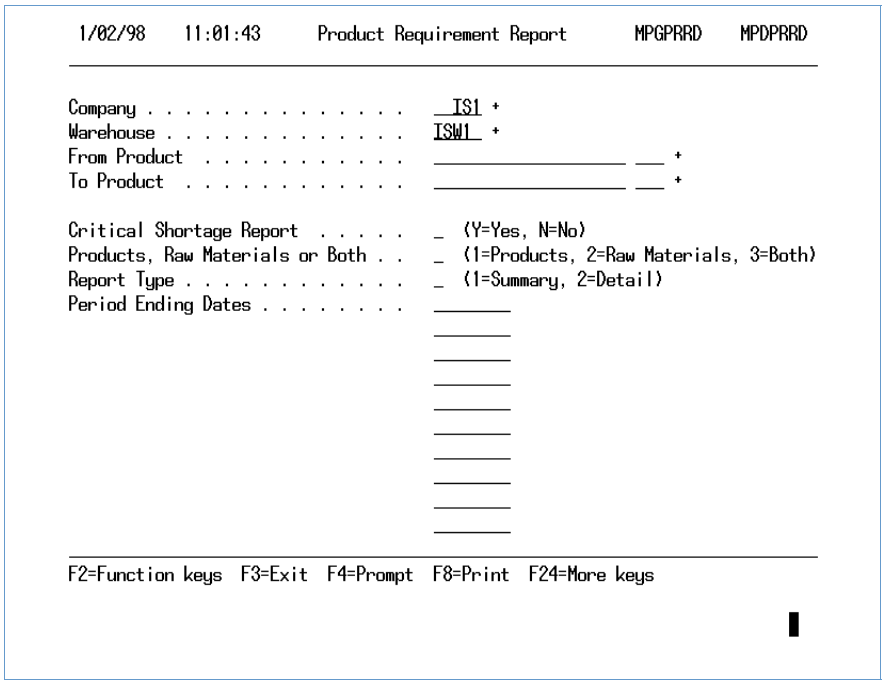


Figure A-8: Product Requirement Report prompt screen

The system requires entries in *Critical Shortage Report* and *Products, Raw Materials or Both,* and *Report Type* fields.

Leave the *Company* and *Warehouse* fields blank to produce a report for all companies and warehouses. Complete *Company* and leave *Warehouse* blank for a

report of all warehouses for the company you specify. You must complete at least one *Period Ending Dates* field.

To print a report of all raw materials and/or products, leave the *From Product* and *To Product* fields blank. To produce a report for a single item, enter the same identifier in both fields.

If you are using the Size code as part of your product ID, the report will include all sizes of any products you select.

Type **Y** in the *Critical Shortage Report* field to produce a report that lists only items with negative totals in one of the specified periods.

After making your entries, press F8 to run the report.

This report uses the MPS/MRP Column in *Control Files, Work with Inventory Type File* option in Infinium IC.

A sample report is on the next page.

```
MPGPRR     MPTPRR                P R O D U C T   R E Q U I R E M E N T S   R E P O R T                                      PAGE    1
11/07/01    9:27:24                                                                                                             PJT
-----------------------------------------------------------------------------------------------------------------------------------------

  Company:   S2K  Warehouse: S2KW1
 Product  RAW10                 LABOR                  Min:        Max:       Onhand Inventory:   HR    Other Inventory:       HR
                               10/30/01   11/30/01  0/00/00  0/00/00  0/00/00   0/00/00 0/00/00   0/00/00   0/00/00     0/00/00 Total:
 WORK IN PROCESS (BATCH USAGE)   8.0368                                                                                       8.0368
 SCHEDULED USAGE (BATCH USAGE)  18.2738                                                                                      18.2738
 FIRM PLAN ORDER (BATCH USAGE)  12.0435                                                                                      12.0435

 * Projected Inventory Total     38.3541-   38.3541-                                                                         38.3541-
-----------------------------------------------------------------------------------------------------------------------------------------

-----------------------------------------------------------------------------------------------------------------------------------------
                                **********   E N D   O F   R E P O R T   **********
```

Printing the Resource Load Summarization Report

The *Resource Load Summarization* option provides, in either display or report format, information about selected resources from either scheduled or in process batches in Infinium MC.

Information provided includes:

- Planned usage date
- Resource
- Resource description
- Scheduled quantity
- Daily capacity
- Percent utilization

You also have the option of writing the information to a work file which you can transfer to a personal computer for further processing.

Use the menu path below.

- *Advanced Planning Report/Display*
  - *Resource Load Summarization* [RLS]

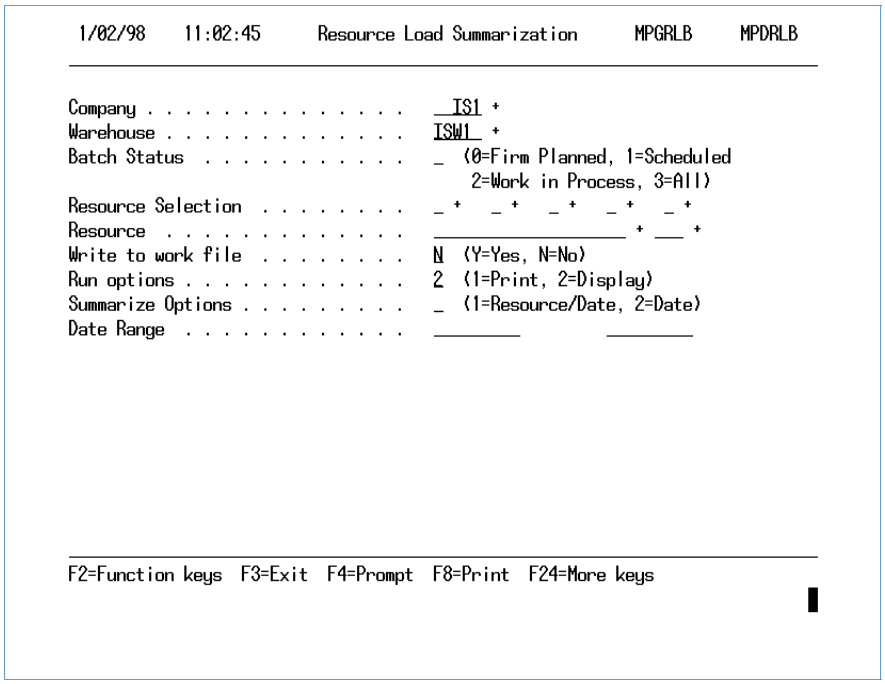


Figure A-9: Resource Load Summarization screen

The system requires entries in the *Batch Status, Write to work file, Run options,* and *Summarize Options* fields.

Leave the *Resource Selection* and *Resource* fields blank to include all resources on the display or report.

You can display the information provided by this option or you can print the Resource Load Summarization report.

Type **2** in this field to display the information, beginning with the screen on the following page.

To print the report, type **1** in the *Run options* field and press F8. A sample report is on the following page.

R E S O U R C E L O A D R E P O R T

11/06/01 13:58:22 PJT

Planned Usage Date	Resource	Size	Description	Scheduled Quantity	UM	Daily Capacity	Percent Utilization
9/25/01	RAW10		LABOR	.8265	HR		
9/26/01	RAW10		LABOR	.8265-	HR		
10/02/01	RAW10		LABOR	7.2406	HR		
10/04/01	RAW10		LABOR	4.0184	HR		
10/09/01	RAW10		LABOR	4.0184	HR		
10/11/01	RAW10		LABOR	4.0184	HR		
10/13/01	RAW10		LABOR	4.0184	HR		
10/13/01	RAW10		LABOR	.9988	HR		
10/26/01	RAW10		LABOR	1.9976	HR		

Printing the Rough Cut Capacity Report

This report provides information from the Master Production Schedule about capacity needs for key materials and resources. You can limit the selection of resources to specified resource types. You can also base the selection of resources on the standard formula for a product or use the rough cut formula specified in the formula record to limit the resources selected.

This report includes the following information:

- Period, including start and end dates
- Resource capacity, as defined in the Item Warehouse file
- Planned usage
- Prior committed quantity
- Percent usage with a threshold flag
- Cumulative percent usage with a threshold flag

Use the menu path below.

- *Advanced Planning Report/Display*
  - *Rough Cut Capacity Report* [RCCP]

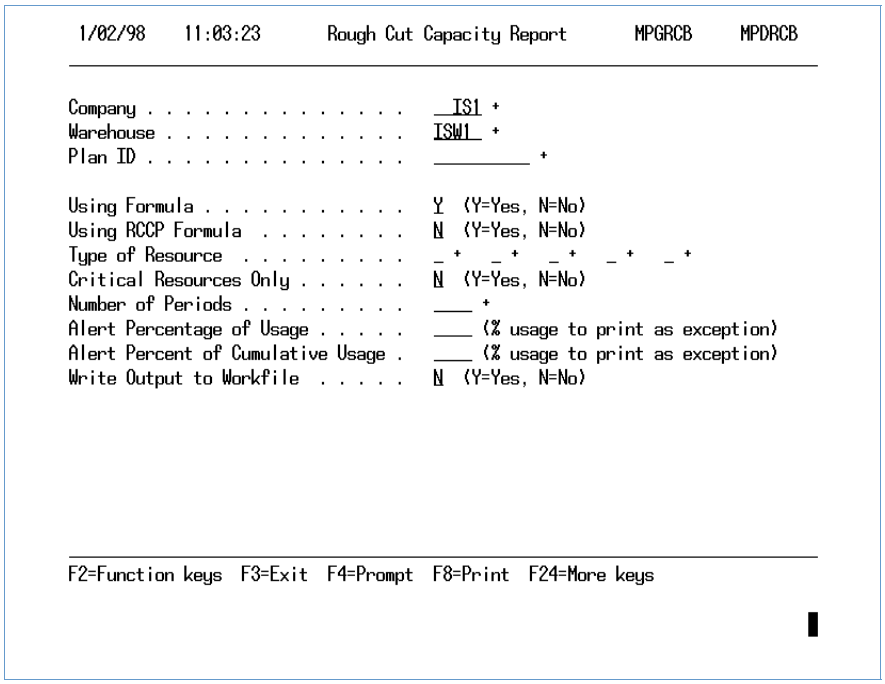


Figure A-10: Rough Cut Capacity Report selection screen

The system requires entries in the *Plan ID, Using Formula, Using RCCP Formula, Critical Resources Only,* and *Write Output to Workfile* fields.

Using RCCP Formula

Type **Y** in this field if you want the system to use the rough cut formula rather than the standard formula for generating this report or display.

Use the *Work with Formula Description* option on the *Formula Management* menu in Infinium PF to enter a formula ID for the Rough Cut Capacity Plan formula.

The system generates the report after you press F8.

MPGRCC MPTRCC R O U G H C U T C A P A C I T Y P L A N N I N G PAGE 1
11/06/01 13:58:44 PJT

Company S2K Warehouse S2KW1 Plan ID 2 PLAN FOR S2K'S WAREHOUSE 1
Resource RAW10 LABOR
Daily Capacity HR

Period	From Date	To Date	Capacity	Planned Usage	Prior Committed	Percent Usage	Alert	Cumulative Percent	Alert
1	10/02/2001	10/02/2001			7.2406				
2	10/03/2001	10/03/2001			4.0184				
3	10/04/2001	10/04/2001			9.0471				
4	10/05/2001	10/05/2001							
5	10/06/2001	10/06/2001							
6	10/09/2001	10/13/2001		.1644	13.0540				
7	10/16/2001	10/20/2001							
8	10/23/2001	10/27/2001			4.9940				
9	10/30/2001	12/12/2001		14.0271					
10	12/13/2001	1/25/2001							

Printing Action Messages

Use this option to print action messages created when you generate the MPS and MRP. These messages prompt you to create new purchase or manufacturing orders, or make changes to existing orders to bring receipts into phase with requirements.

Use the menu path below.

- *Advanced Planning Report/Display*
  - *Print Action Messages* [PAM]

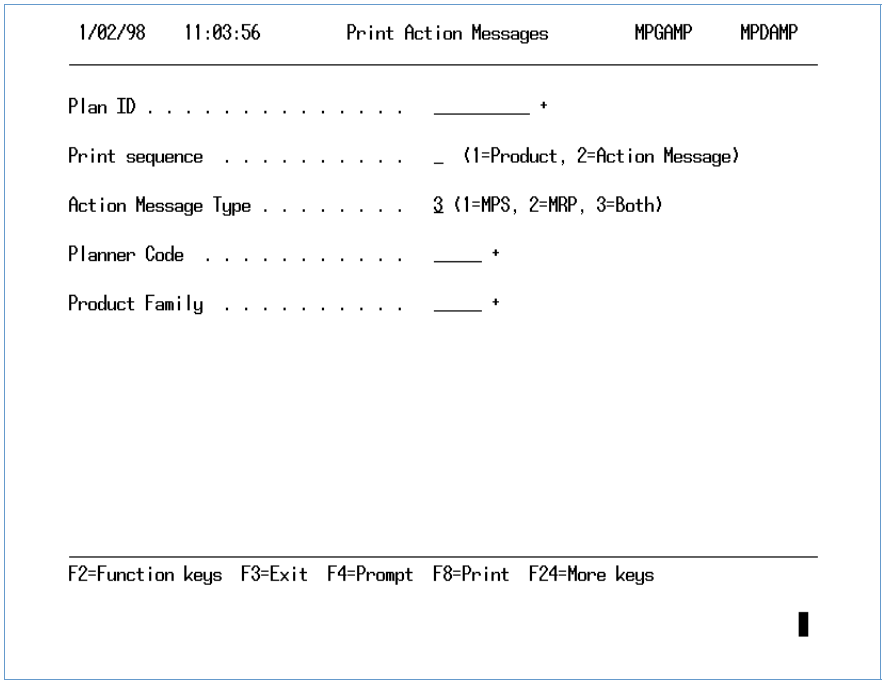


Figure A-11: Print Action Messages prompt screen

The system requires entries in the *Plan ID*, *Print sequence*, and *Action Message Type* fields.

If you complete both the *Planner Code* and *Product Family* fields, both fields must match in the Item Warehouse file in order for a product to be in the report.

After completing this screen, press F8 to print the report. Depending on your choice of a product report or an action message report, a corresponding window displays asking for either a product range or an action message range. If you wish to include all action messages or all products, leave the fields blank and press F8.

A sample of a report is on the following page.

```
MPGAMP     MPTAMP                                       Print Action Message                                         PAGE    1
11/06/01   17:03:35
-----------------------------------------------------------------------------------------------------------------------------------
 Plan ID . . . . . . . . . . . . . . . . :         2
 Company . . . . . . . . . . . . . . . . :   S2K
 Warehouse . . . . . . . . . . . . . . . : S2KW1
 Start Date  . . . . . . . . . . . . . . : 10/02/2001
-----------------------------------------------------------------------------------------------------------------------------------
 Type  Message Id  Description                             Quantity     UM      Start Date    Due Date      Formula
 Product . . . . . . . . . . . . . . . . : S2KMFGP1          GL     MFG PRODUCT #1
 MPS   MPS0005     Inadequate Lead Time                     52.0000     GL       9/26/2001    10/09/2001    S2KFORM1
 MPS   MPS0005     Inadequate Lead Time                     46.0000     GL      10/03/2001    10/16/2001    S2KFORM1
 MPS   MPS0002     Reschedule Out                           54.0000     GL      10/06/2001    10/09/2001    S2KFORM1
 MPS   MPS0006     Past Due Receipts                        54.0000     GL                                    S2KFORM1
 Product . . . . . . . . . . . . . . . . : S2KMFGP3          DR     MFG PRODUCT #3
 MPS   MPS0005     Inadequate Lead Time                     14.4755     GL       9/25/2001    10/09/2001    S2KFORM5
 MPS   MPS0002     Reschedule Out                         1247.1049     GL      10/05/2001    10/09/2001    S2KFORM5
 Product . . . . . . . . . . . . . . . . : RAW12                    PROCESS RAW MATERIAL
 MRP   MPS0004     Open Order                               21.7216     LB                                    S2KFORM5
 MRP   MPS0004     Open Order                               45.3030     LB      10/02/2001                  S2KFORM5
 MRP   MPS0005     Inadequate Lead Time                     21.7216     LB                                    S2KFORM5
 MRP   MPS0001     Reschedule In                            15.0000     LB      10/03/2001    10/02/2001    S2KFORM5
 MRP   MPS0001     Reschedule In                             5.0000     LB      10/05/2001    10/04/2001    S2KFORM5
 Product . . . . . . . . . . . . . . . . : RAW17                    PROCESS RAW MATERIAL
 MRP   MPS0004     Open Order                             7802.1964     GL                                    S2KFORM5
 MRP   MPS0005     Inadequate Lead Time                   7802.1964     GL                                    S2KFORM5
 Product . . . . . . . . . . . . . . . . : S2KMFGP4          5G     MFG PRODUCT #4
 MRP   MPS0004     Open Order                                1.1250     GL                                    S2KFORM5
 MRP   MPS0004     Open Order                                 .1250     GL      10/02/2001                  S2KFORM5
 MRP   MPS0005     Inadequate Lead Time                      1.1250     GL                                    S2KFORM5
```

Printing Infinium Advanced Planning Forecast Reports

Use the *Import Forecast* option to import forecasts from the Common Services Transfer file or the Advanced Planning Transfer file.

Printing the Imported Forecast Listing and the Import Forecasts Exceptions Reports

This option requires exclusive access to the data files. Make sure no other import related options are being run prior to executing this option.

Use the menu path below.

- *Forecast Import*
  - *Import Forecast* [IF]

```
 6/01/00    11:05:40           Import Forecast           MPGIFB     MPDIFB
 ____________________________________________________________________________


    A job will be submitted to receive external Forecast data
    into the Imported Forecast file.

    Exclusive access to the Imported Forecast file is required
    to receive the data.  Make sure no other Forecast Import
    related option will run during this receiving process.

    Press Receive key to submit the job.

Point of Origin . . . . . .   MPINFINIUM
Import from . . . . . .  . .  1     0=Common Services, 1=MP Trf file
Import Handler  . . . . . .   _________




 ____________________________________________________________________________
F2=Function keys  F3=Exit  F6=Receive  F10=QuikAccess  F18=Message line
```

Figure A-12: Import Forecast screen

Importing Forecasts

Make sure no other user is performing any *Forecast Import* option when you execute this option. *Forecast Import* options include: *Import Forecasts, Work with Imported Forecast, Post Imported Forecast,* and *Purge Imported Forecast File*.

Verify the default entries on the screen and change them if necessary. Press F6 to execute the import. Press F3 to cancel and exit.

If your data source is the MP Transfer file, MPPTF, be aware that the system clears this file of all data after an import, even if there are errors.

Regardless of your data source, the system automatically generates the Import Forecast Exception report when you perform this option. The report heading will differ by data source. It will be either the Import Forecast Exceptions report or the Import Forecast via Common Services Exception report. The system also generates the Imported Forecast Listing report.

You can also generate the Imported Forecast Listing report by pressing F8 on the Work with Imported Forecast screen.

```
MPGISS     MPTIFL                                               I M P O R T E D   F O R E C A S T   L I S T I N G                                                        PAGE    1
 6/11/01   17:26:22                                                                                                                                                                 PG
------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------
                                        FCST                                     FORECAST                                                                              TRANSACTION
   CO  WHSE   PRODUCT               SIZE TYPE   FORECAST DESCRIPTION              DATE            QUANTITY  UM     STATUS       ORIGIN      USER ID     TRANS ID     DATE
 COMP2  WHSE2  ITEM21                 EA   FUTUR                                   00970601    17000.0000  KG     NEW          ANALYST 01  PG          024786       06-11-2001
                                                                                   00970701    19000.0000  KG
                                                                                   00970801    19000.0000  KG
                                                                                   00970901    22000.0000  KG
                                                                                   00971001    16000.0000  KG
 COMP2  WHSE2  ITEM22                 EA   PROMO                                   00970601      700.0000  KG
                                                                                   00970701      650.0000  KG
                                                                                   00970801      600.0000  KG
                                                                                   00970901      550.0000  KG
 COMP4  WHSE4  ITEM41                 EA   FUTUR                                   00970601    17000.0000  KG
                                                                                   00970701    19000.0000  KG
                                                                                   00970801    19000.0000  KG
                                                                                   00970901    22000.0000  KG
                                                                                   00971001    16000.0000  KG
 COMP4  WHSE4  ITEM42                 EA   PROMO                                   00970601      700.0000  KG
                                                                                   00970701      650.0000  KG
                                                                                   00970801      600.0000  KG
                                                                                   00970901      550.0000  KG
                                                                                   00971001      500.0000  KG
 COMP5  WHSE5  ITEM51                 EA   FUTUR                                   00970601    17000.0000  KG
                                                                                   00970701    19000.0000  KG
                                                                                   00970801    19000.0000  KG
                                                                                   00970901    22000.0000  KG
                                                                                   00971001    16000.0000  KG
                            ***** RECORDS SELECTED  . :  00018
                            ***** RECORDS IMPORTED  . :  00024
                                                                                    ********** END OF REPORT **********
```

This is the Import Forecast using the Infinium MP Transfer file – Imported Forecasts Listing. This listing displays all successfully imported forecast records. Remember the *Origin* and *Transaction ID* field values. In order to subset using the transaction ID in the *Work with Imported Forecast* option, you must obtain that information from this report.

MPGICS MPTIFL I M P O R T E D F O R E C A S T L I S T I N G PAGE 1
6/12/01 12:00:54 PG

CO	WHSE	PRODUCT	SIZE	FCST TYPE	FORECAST DESCRIPTION	FORECAST DATE	QUANTITY	UM	STATUS	ORIGIN	USER ID	TRANS ID	TRANSACTION DATE
INF	INF	PROD20	LB	*RR01		20010101	100.0000	LB	NEW	ANALYST 05	PG	025136	06-12-2001
						20010104	100.0000	LB					
						20010105	7000.0000	LB					
						20010106	5000.0000	LB					
						20010107	15000.0000	LB					
						20010110	250.0000	LB					
						20010114	200.0000	LB					
						20010121	10000.0000	LB					
						20010131	400.0000	LB					
						20010214	200.0000	LB					
						20010228	500.0000	LB					
INF	INF	PROD21	LB	FUTUR		20010731	5.0000	LB					
						20010801	10.0000	LB					
						20010802	7.0000	LB					
						20010803	12.0000	LB					
						20010807	15.0000	LB					
						20010814	25.0000	LB					
						20010821	20.0000	LB					
						20010828	22.0000	LB					
						20010901	50.0000	LB					
						20011001	50.0000	LB					
						20011101	75.0000	LB					
						20010315	200.0000	LB					
						20010331	250.0000	LB					
						20010401	600.0000	LB					
						20010413	500.0000	LB					
INF	INF	PROD20	LB	RETAL		20010801	200.0000	LB					
						20010802	100.0000	LB					
						20010803	250.0000	LB					
						20010804	300.0000	LB					
						20010805	100.0000	LB					
						20010815	1000.0000	LB					
						20010831	1500.0000	LB					
INF	INF	PROD23	LB	TFR		20011201	10.0000	LB					
						20011202	10.0000	LB					
						20011203	10.0000	LB					
						20011204	10.0000	LB					
						20011205	10.0000	LB					
						20011206	10.0000	LB					
INF	INF	PROD25	LB	*RR01		20010501	2000.0000	LB					
						20010502	1000.0000	LB					
INF	INF	BLSPRODUCT	N/A	SPEC		20011223	10.0000	LB					
						20011230		LB					
						20010106	10.0000	LB					
INF	INF	PRODUCT5	EA	FUTUR		20010115	1000.0000	EA					
INF	INF	PROD11		*PG03		20011101	50.0000	LB					
INF	INF	PROD11		*PG03		20011201	50.0000	LB	NEW	ANALYST 05	PG	025136	06-12-2001
INFINIUM				TFR		00000000							
						00000000							

***** RECORDS SELECTED . : 00050
***** RECORDS IMPORTED . : 00049

********** END OF REPORT **********

This is the Import Forecast using AM Common Services – Imported Forecast Listing report. This report displays all successfully imported forecast records.

```
MPGISS     MPTIFE                              I M P O R T   F O R E C A S T                                                  PAGE    1
 6/11/01   15:10:44                                 EXCEPTIONS REPORT                                                          PG

-------------------------------------------------------------------------------------------------------------------------------------
     IMPORTED FORECAST FILE, MPPIF, CANNOT BE ALLOCATED.
                           ***** NO RECORDS SELECTED
                                      ********** END OF REPORT **********
```

This is the Import Forecast using the Infinium MP Transfer file – Exceptions report. In this case, the system cannot allocate the Imported Forecast file and no further processing occurs. The system retains data in the Infinium MP Transfer file.

```
MPGISS     MPTIFE                                        I M P O R T   F O R E C A S T                                      PAGE    1
 6/11/01   15:21:10                                           EXCEPTIONS REPORT                                              PG
-------------------------------------------------------------------------------------------------------------------------------------


MP TRANSFER FILE, MPPTF, CANNOT BE ALLOCATED.
                           ***** NO RECORDS SELECTED
                                           ********** END OF REPORT **********
```

This is the Import Forecast using the Infinium MP Transfer file – Exceptions report. In this case, the system cannot allocate the Infinium MP Transfer file. No further processing occurs and data remains in the Infinium MP Transfer file.

```
MPGISS     MPTIFE                           I M P O R T   F O R E C A S T                                                  PAGE    1
 6/11/01   17:26:22                             EXCEPTIONS REPORT                                                                 PG

------------------------------------------------------------------------------------------------------------------------------------------
 TRANSACTION NUMBER:      1
 ItemCode,Location,UD01,UD02,UD03,UD04,UD05,UD06,UD07,UD08
                                                  THERE MUST BE AT LEAST ONE QUANTITY FIELD.  MINIMUM NUMBER OF FIELDS EXPECTED:   12
; AVAILABLE:    9
                                                  ALL THE ASSOCIATED DATA RECORDS ARE REJECTED:
 ITEM11,11,GL,RETAL,    1,,,,,,GL,16000,15500,15600,15550,15410,15264,18625,15772,11989,21982,15813,15059
 ITEM12,11,EA,RETAL,    1,,,,,,EACH,17217,19275,39433,22884,16410,18264,28625,22772,24989,21982,21813,21059
 ITEM13,11,LB,RETAL,    1,,,,,,LB,1000,1000,1100,900,970,970,970,900,970,970,900,900
------------------------------------------------------------------------------------------------------------------------------------------
 TRANSACTION NUMBER:      2
 ITEM22,WHSE2,EA,PROMO,COMP2,,,,,,KG,700,650,600,550,5?0
                                                  CANNOT DETERMINE QUANTITY.     QUANTITY IN ERROR:  5?0               FOR PERIOD:   5
------------------------------------------------------------------------------------------------------------------------------------------
 TRANSACTION NUMBER:      3
 IT,EM31,WHSE3,EA,FUTUR,COMP3,,,,,,KG,17000,19000,19000,22000,16000
                                                  FIELDS MISMATCH.     TOTAL FIELD NAMES:  016     TOTAL DATA FIELDS:  017
------------------------------------------------------------------------------------------------------------------------------------------
---------------------------------------------------------------
                            ***** RECORDS PROCESSED . :  00018
                            ***** TOTAL TRANSACTIONS  :  00005
                            ***** TOTAL DATA RECORDS  :  00009
                                                        ********** END OF REPORT **********
```

This is the Import Forecast using the Infinium MP Transfer file – Exceptions report. In this example, the files have been successfully allocated and the transfer is complete. The system clears the Infinium MP Transfer file of all data.

```
MPGICS     MPTIFE              I M P O R T   F O R E C A S T   V I A   C O M M O N   S E R V I C E S                    PAGE    1
 6/12/10   12:07:20                              EXCEPTIONS REPORT                                                          PG

-------------------------------------------------------------------------------------------------------------------------------
     IMPORTED FORECAST FILE, MPPIF, CANNOT BE ALLOCATED.
                           ***** NO RECORDS SELECTED
                                                                          ********** END OF REPORT **********
```

This is the Import Forecast using AM Common Services – Exceptions report. In this example, the system cannot allocate the Imported Forecast file and no further processing occurs.

```
MPGICS     MPTIFE                           I M P O R T   F O R E C A S T   V I A   C O M M O N   S E R V I C E S          PAGE    1
 6/12/01   12:04:02                                                EXCEPTIONS REPORT                                          PG
-------------------------------------------------------------------------------------------------------------------------------

SELECTED MEMBER, MP001D01   , IN COMMON SERVICES FILE, AMPTF, CANNOT BE ALLOCATED.
                           ***** NO RECORDS SELECTED
                                                                          ********** END OF REPORT **********
```

This is the Import Forecast using AM Common Services – Exceptions report. In this example, the system cannot allocate the Infinium MP Transfer file and no further processing occurs.

```
MPGICS     MPTIFE                  I M P O R T   F O R E C A S T   V I A   C O M M O N   S E R V I C E S                  PAGE    1
 6/12/01   12:00:54                                                EXCEPTIONS REPORT                                          PG
-------------------------------------------------------------------------------------------------------------------------------
     RECORD NO.  ERROR
          50     DATA IN THIS RECORD CAUSED PROGRAM AMGCRDCS TO END ABNORMALLY.     TRANSFER PROCESS TERMINATED.

                          ***** RECORDS PROCESSED . :  00050
                          ***** RECORDS IN ERROR  . :  00001
                                                                  ********** END OF REPORT **********
```

This is the Import Forecast using AM Common Services – Exceptions report. In this case the system successfully allocates the file and the transfer occurs.

Printing Infinium Advanced Planning Post Reports

Use the *Post Imported Forecast* option to post all unposted records from the Imported Forecast file, MPPIF, to the Infinium MP Forecast Database file, MPPMF.

Printing the Imported Forecast Post Exceptions, the Imported Forecast Post, and the Imported Forecast Post and Purge Reports

Use the menu path below.

- *Forecast Import*
  - *Post Imported Forecast* [PIF]

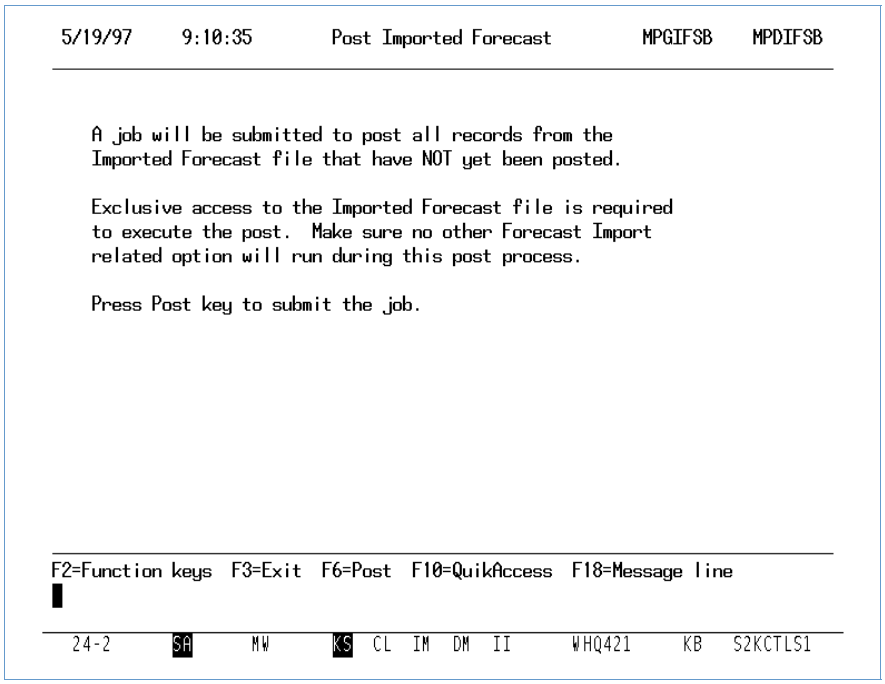


Figure A-13: Post Imported Forecast screen

Posting Imported Forecasts

Make sure no other user is performing any *Forecast Import* option when you execute this option. *Forecast Import* options include: *Import Forecasts, Work with Imported Forecast, Post Imported Forecast,* and *Purge Imported Forecast File*.

Press F6 to post all unposted records in the Imported Forecast file, MPPIF. The system performs all validations as executed in the *Work with Imported Forecast* option. Press F3 to cancel and exit.

Whenever you post, the system automatically generates the Imported Forecast Post Exceptions report.

If you type **0** in the *Delete of Posted Forecasts* field and **Y** in the *List Purged Forecast* field in the Infinium MP Control files, the system automatically generates the Imported Forecast Post and Purge report for you whenever you post forecasts.

If you type **1** in the *Delete of Posted Forecast* field and **Y** in the *List Posted Forecast* field, the system automatically generates the Imported Forecast Post report whenever you post forecasts.

You can also post forecast records via the *Work with Imported Forecast* option.

CO	WHSE	PRODUCT	SIZE	FCST TYPE	FORECAST DESCRIPTION	FORECAST DATE	QUANTITY	UM	STATUS	ORIGIN	USER ID	TRANS ID	TRANSACTION DATE
INF	INF	PROD11		FUTUR	REGION2'S FRCST TYPE	11/01/2001	50.0000	LB	NEW		PG	038683	07/11/2001
						12/01/2001	50.0000	LB	NEW		PG	038683	07/11/2001

***** RECORDS SELECTED . : 00130
***** RECORDS POSTED . . : 00047

********** END OF REPORT **********

```
MPGIFS     MPTIFSE                          I M P O R T E D   F O R E C A S T   P O S T                                  PAGE    5
 7/22/01    9:29:58                                    EXCEPTIONS REPORT                                                 PG
-------------------------------------------------------------------------------------------------------------------------------
                                        FCST   FORECAST
   CO  WHSE   PRODUCT             SIZE  TYPE   DATE             QUANTITY   UM
 INF01                                  TFR    03/01/2001                  EACH
                                                 ERROR IN WAREHOUSE CODE
                                                 ERROR IN PRODUCT-SIZE CODE
                                                 ERROR IN UNIT OF MEASURE
 INF01                                  TFR    04/01/2001                  EACH
                                                 ERROR IN WAREHOUSE CODE
                                                 ERROR IN PRODUCT-SIZE CODE
                                                 ERROR IN UNIT OF MEASURE
 INF01                                  TFR    04/01/2001                  EACH
                                                 ERROR IN WAREHOUSE CODE
                                                 ERROR IN PRODUCT-SIZE CODE
                                                 ERROR IN UNIT OF MEASURE
 INF01                                  TFR    05/01/2001                  EACH
                                                 ERROR IN WAREHOUSE CODE
                                                 ERROR IN PRODUCT-SIZE CODE
                                                 ERROR IN UNIT OF MEASURE
 INF01                                  TFR    05/01/2001                  EACH
                                                 ERROR IN WAREHOUSE CODE
                                                 ERROR IN PRODUCT-SIZE CODE
                                                 ERROR IN UNIT OF MEASURE
 INF01                                  TFR    06/01/2001                  EACH
                                                 ERROR IN WAREHOUSE CODE
                                                 ERROR IN PRODUCT-SIZE CODE
                                                 ERROR IN UNIT OF MEASURE
 INF01                                  TFR    06/01/2001                  EACH
                                                 ERROR IN WAREHOUSE CODE
                                                 ERROR IN PRODUCT-SIZE CODE
                                                 ERROR IN UNIT OF MEASURE
 INF01                                  TFR    07/01/2001                  EACH
                                                 ERROR IN WAREHOUSE CODE
                                                 ERROR IN PRODUCT-SIZE CODE
                                                 ERROR IN UNIT OF MEASURE
 INF01                                  TFR    07/01/2001                  EACH
                                                 ERROR IN WAREHOUSE CODE
                                                 ERROR IN PRODUCT-SIZE CODE
                                                 ERROR IN UNIT OF MEASURE
 INF01                                  TFR    08/01/2001                  EACH
                                                 ERROR IN WAREHOUSE CODE
                                                 ERROR IN PRODUCT-SIZE CODE
                                                 ERROR IN UNIT OF MEASURE
                          ***** RECORDS PROCESSED . :  00130
                          ***** RECORDS IN ERROR  . :  00083
                                          ********** END OF REPORT **********
```

MPGIFS MPTIFL I M P O R T E D F O R E C A S T P O S T A N D P U R G E PAGE 2
7/22/01 10:01:12 PG

CO	WHSE	PRODUCT	SIZE	FCST TYPE	FORECAST DESCRIPTION	FORECAST DATE	QUANTITY	UM	STATUS	ORIGIN	USER ID	TRANS ID	TRANSACTION DATE
INF	INF	PROD11		FUTUR	REGION 2'S FCST TYPE	11/01/2001	50.0000	LB	NEW		PG	038683	07/11/2001
						12/01/2001	50.0000	LB	NEW		PG	038683	07/11/2001

***** RECORDS SELECTED . : 00130
***** RECORDS POSTED . . : 00047

********** END OF REPORT **********

Printing the Imported Forecasts Purge Report

Use the *Purge Imported Forecast File* option to purge only posted forecasts.

Purge forecasts of any status using the *Work with Imported Forecast* option.

It is not necessary to execute this option if you type **0** in the *Delete of Posted Forecasts* field in the Infinium MP Control files.

Use the menu path below.

- *Forecast Import*
  - *Purge Imported Forecast File* [PIFF]

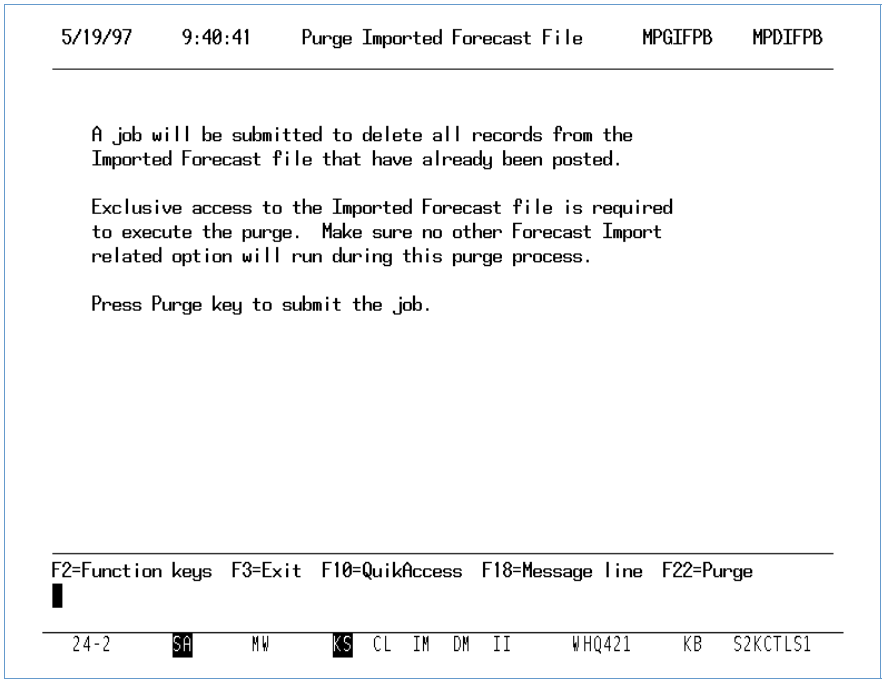


Figure A-14: Purge Imported Forecast File screen

Make sure no other user is performing any Forecast Import option when you execute this option. Forecast Import options include: *Import Forecasts*, *Work with Imported Forecast*, *Post Imported Forecast*, and *Purge Imported Forecast File*.

Press F22 to execute the purge and F3 to cancel and exit.

When you run this option, the system can automatically generate the Imported Forecast Purge report. This depends on your Control file settings.

CO	WHSE	PRODUCT	SIZE	FCST TYPE	FORECAST DESCRIPTION	FORECAST DATE	QUANTITY	UM	STATUS	ORIGIN	USER ID	TRANS ID	TRANSACTION DATE
INF01	INF01	PG-PRODUCT-1	EA	TFR	TEST MPS WITH TRANSFERS	01-01-2001	21059.0000	EACH	POSTED	--FTP	PG	028506	
INF01	INF02	PG-PRODUCT-1	EA	PROMO	PROMOTIONAL SALE	06-01-2001	700.0000	KG	POSTED	VIA MP TRF	PG	028332	
						07-01-2001	650.0000	KG	POSTED	VIA MP TRF	PG	028332	
						08-01-2001	600.0000	KG	POSTED	VIA MP TRF	PG	028332	
						09-01-2001	550.0000	KG	POSTED	VIA MP TRF	PG	028332	
						10-01-2001	500.0000	KG	POSTED	VIA MP TRF	PG	028332	

***** RECORDS DELETED . . : 00147

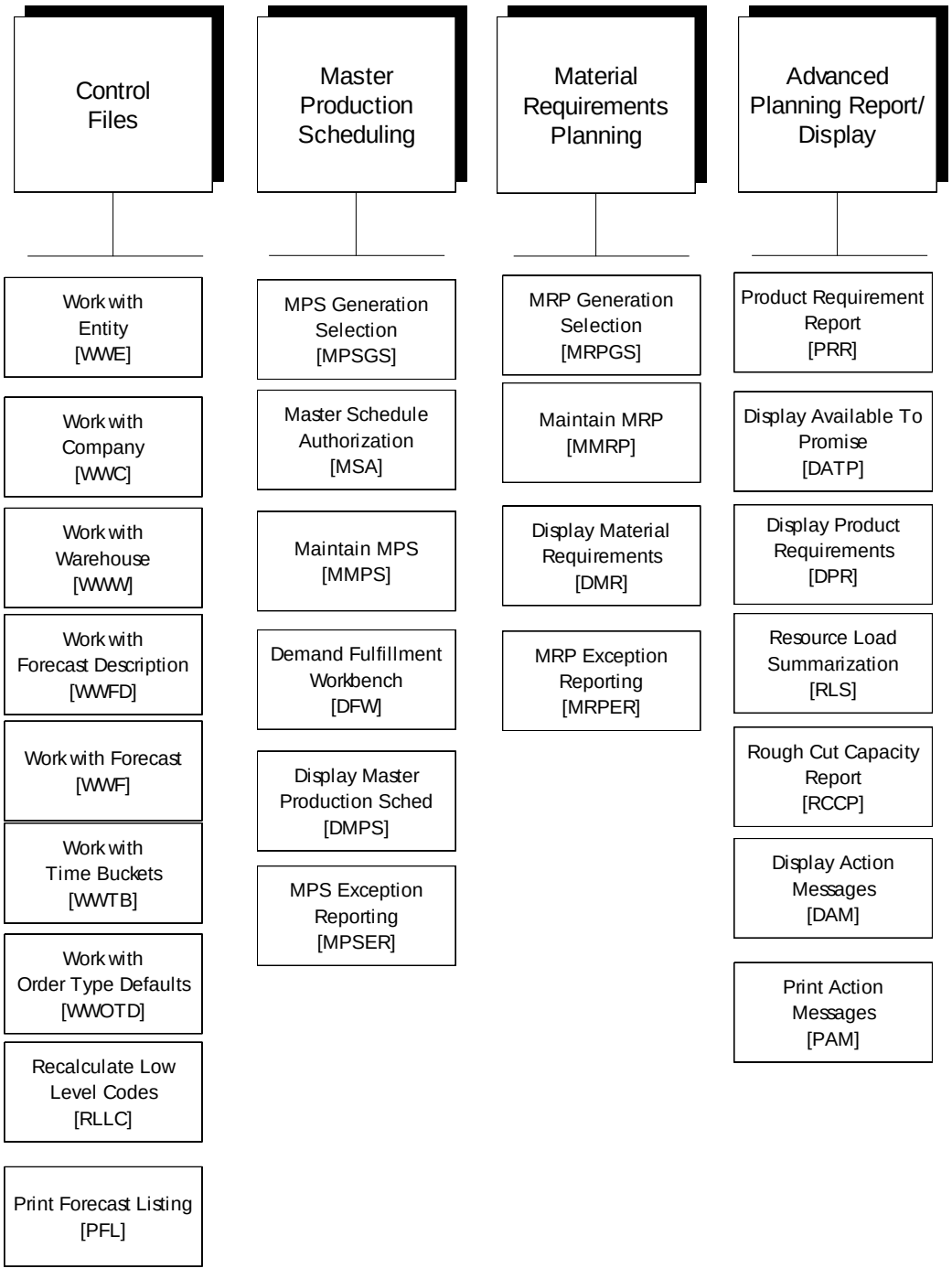
Notes

Appendix B
Infinium Advanced Planning Menu Tree

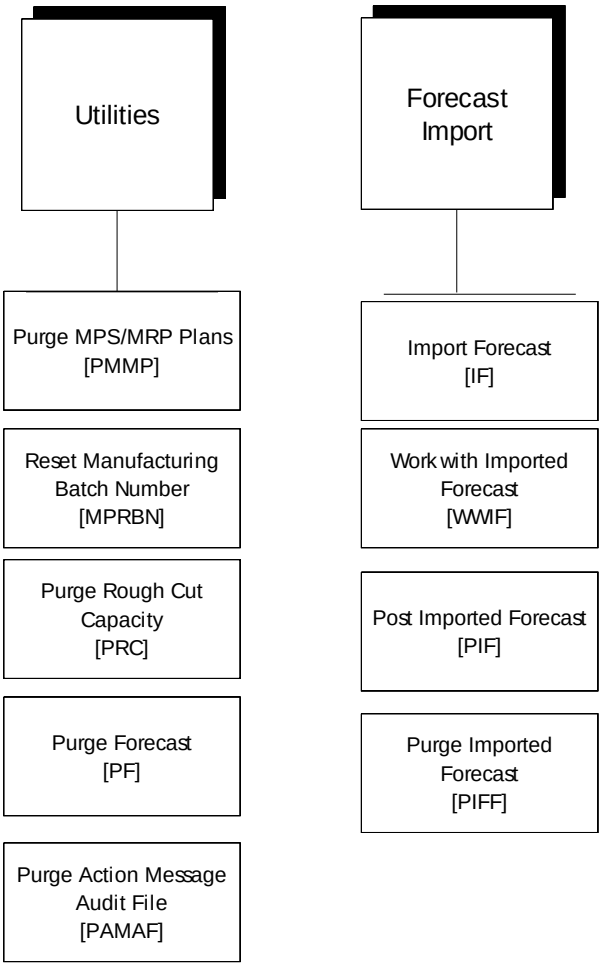
B

This appendix contains the menu tree for Infinium MP.

Infinium MP Menu Tree



Infinium MP Menu Tree



Notes

Appendix C
Infinium MP Action Messages

C

Infinium MP uses action messages to recommend what you should do to correct a potentially unbalanced inventory situation. Action messages are system generated and system defined for you in the Infinium CA *Code Files* menu, the *Work with Code Tables* option.

WARNING

Do not delete the **MPS** Code type in the *Work with Code Tables* option

Action Message and Brief Description	MPS	MRP	Action You Should Take
Open Order This informs you that you have an order in the current time period that you need to address.	If there is a Suggested MPS quantity in any bucket after the first time fence, the system calculates the start date for that MPS. If the start date falls after the first time fence, the system sends this message.	If there is a Planned Order Release quantity in any bucket after past due, the system sends this action message.	Schedule a batch or enter a purchase order. If action has not been taken, it is possible that the MPS demand is misstated. Verify the accuracy of the MPS Suggested Order for this time frame.

Action Message and Brief Description	MPS	MRP	Action You Should Take
Inadequate Lead Time Message This tells you that you have a Suggested MPS or a Planned Order Receipt without ample lead time for filling.	If there is a Suggested MPS quantity whose start date falls within the first time fence, the system sends this message.	If there is a Planned Order Release quantity that falls in the past due bucket, the system sends this message.	Analyze the order to verify that it can be satisfied without adequate lead time.
Reschedule In This message tells you that you have receipts scheduled for a time bucket where they are not needed because the due date for the higher level demand, which generated the original order, has changed.	If 1) available inventory is greater than Maximum Reorder quantity and a quantity exists in either the Firm Planned or Scheduled Receipts bucket, and 2) the first Suggested MPS prior to this receipt occurs after the first time fence bucket then the system sends this message.	If 1) projected available inventory is greater than the Maximum Reorder quantity and a quantity exists in the Scheduled Receipts bucket, and 2) there is a prior Planned Order Receipt, then the system sends this message to schedule this receipt into the time bucket with the prior Planned Order Receipt.	If there is a shortage in an earlier time bucket for a Suggested MPS or a Planned Order Receipt, reschedule into that time bucket.

Action Message and Brief Description	MPS	MRP	Action You Should Take
Reschedule Out and Cancel These messages indicate that you have receipts scheduled for a time bucket where it is not needed or the system has found a place to reschedule this receipt.	You have a Firm Planned or a Scheduled Receipt quantity and either the available quantity is greater than the Maximum Reorder quantity or zero requirements (forecasts, orders, batch usage) exist. If the next Suggested MPS is less than the second time fence or action message cutoff, then the system sends a **Reschedule Out** message to the Suggested MPS. If this is not the case, then the system sends the Cancel message.	You have a Scheduled Receipt quantity and either the available is greater than the Maximum Reorder quantity or zero requirements (independent or dependent demand) exist. If the next Planned Order Receipt is less than the action message cutoff, the system sends a **Reschedule Out** message to the next Planned Order Receipt. If this is not the case, the system sends the Cancel message.	Depending on your message, either reschedule out or cancel the batch or purchase order.
Past Due Receipts This message indicates that you have receipts in the past due column.	If a Firm Planned or Scheduled Receipts quantity is in the past due column, the system sends this message.	If Scheduled Receipts are in the past due column, the system sends this message.	Check on receipts to verify that the MPS and MRP require-ments are still valid.

Action Message and Brief Description	MPS	MRP	Action You Should Take
Order Quantity Exceeded Maximum Reorder Quantity This message occurs when the item's Lot Size Technique is Lot for Lot with Min/Max. When a Suggested MPS or Planned Order Receipt is higher than the Maximum Reorder quantity, this lot size technique only allows the Suggested MPS or Planned Order Receipt to be the Maximum Reorder Quantity. The system sends this message to inform you that your order quantity is less than what is actually needed.	If there is a Suggested MPS quantity in a bucket that exceeds the Maximum Reorder quantity, the system sends this message. The Lot Size Technique resets the Suggested MPS to the Maximum Reorder quantity.	If there is a Planned Order Receipt quantity in a bucket that exceeds the Maximum Reorder quantity, the system sends this message. The Lot Size Technique resets the Planned Order Receipt to the Maximum Reorder quantity.	Review the plans to see if you can increase the order or if you can place an order somewhere else to cover this requirement.

Appendix D
Downloading Sales History Information and Uploading Forecasts

D

The part consists of the following topics:

Overview of Downloading Sales History Data and Uploading Forecasts

Infinium OP provides you with the ability to export sales history data. You can then download the data to your PC for use with a forecast package. In a forecast package, you can analyze sales and create forecasts. You can then upload your forecasts to the AS/400 or iSeries 400 and import them into Infinium MP for use in the Master Production Schedule (MPS).

You can also create manual forecasts using the *Work with Forecast* option in Infinium MP. You can use whatever application you choose.

Use the Download/Upload Overview diagram to assist you in understanding the overall data flow.

Download/Upload Overview

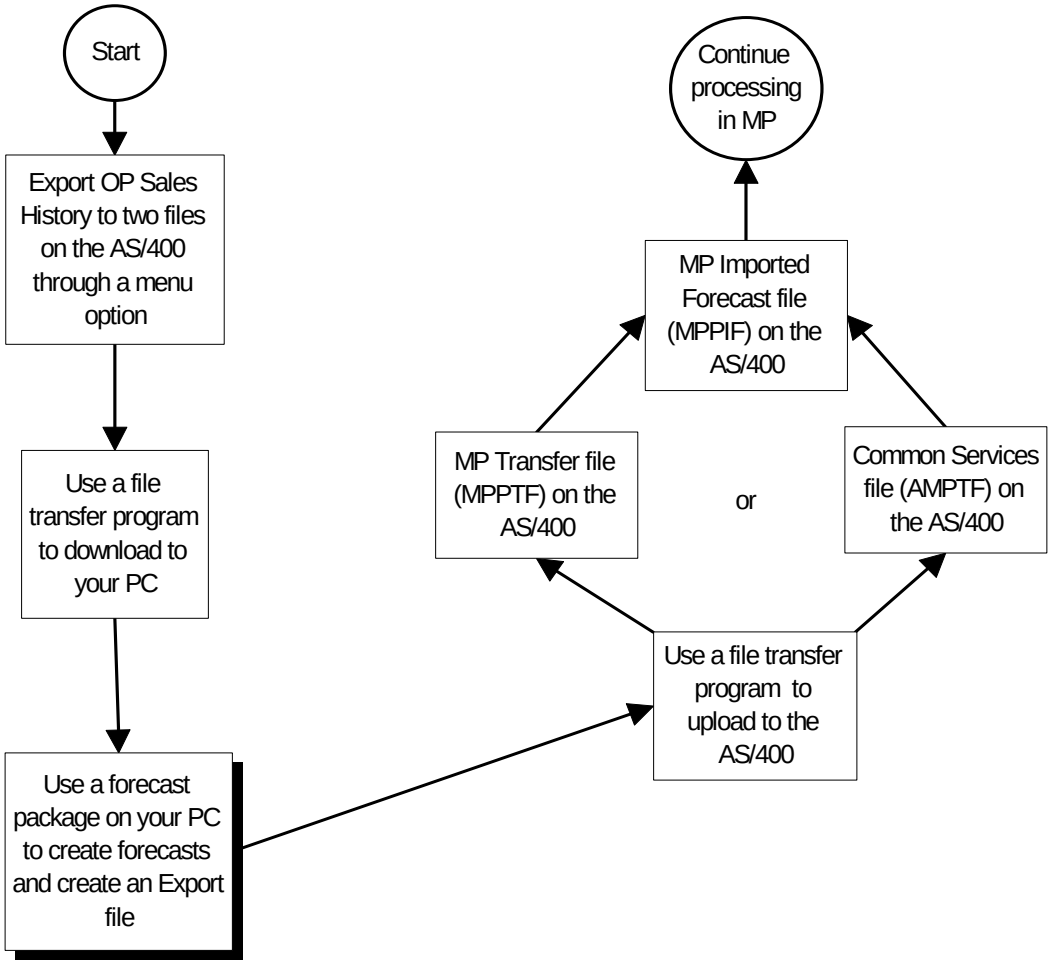


Figure D-1: Download/Upload Overview

The Download/Upload Data Overview diagram identifies the high level steps involved in this process. For further information use the Detailed Download/Upload Data Flow Process diagram.

Detailed Download/Upload Data Flow Process

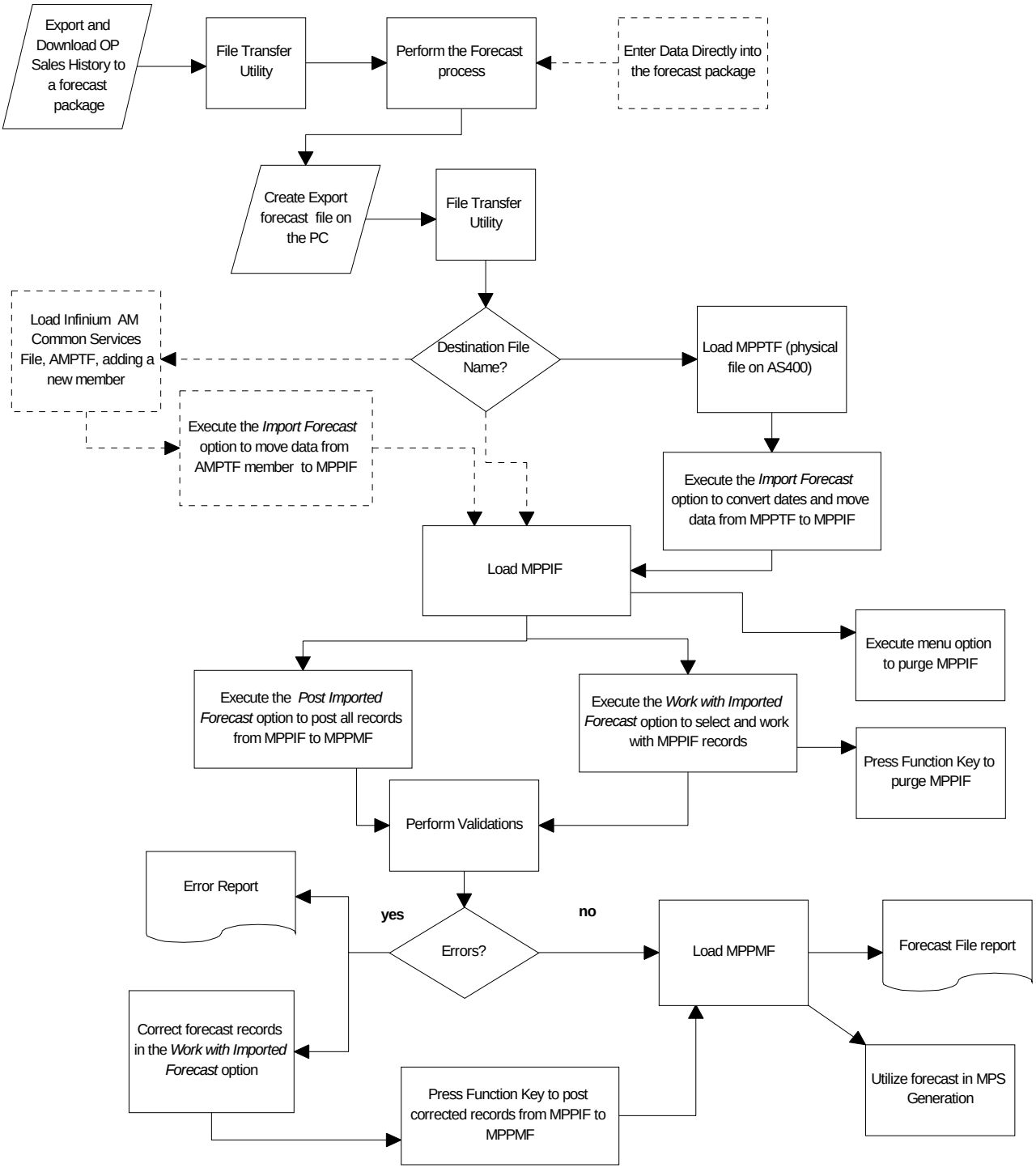


Figure D-2: Detailed Download/Upload Data Flow Process

Processing Steps Overview

The Detailed Download/Upload Data Flow Process diagram along with the steps below provide you with a high level view of the entire process. For further information on each step refer to the related topic in this appendix. Topic titles are identical to step titles.

Step 1 - Completing Preliminary Setup

Before you can upload and import data, you must complete the following:

- You must complete the Forecast Information attribute in the Infinium MP Control files. More fields are available at the entity level so you should complete the record at the entity level and if needed, make specific changes at the warehouse or company level.
- Prior to uploading data from the PC to the AS/400 or iSeries 400, you must move the PC forecast fields to the Infinium MP fields. You do this with a forecast package/Infinium template.
- In order for the AS/400 or iSeries 400 to receive your Export file from a forecast package, you must use a file transfer utility system. You can use IBM's Client Access or any other file transfer program. You can upload to the Infinium MP Transfer file, MPPTF, or you can upload to the Infinium Common Services file, AMPTF.

Step 2 - Exporting Sales History on the AS/400 or iSeries 400

Use the *Export Sales History* option under the *Order Processing Utilities* menu to export data to the AS/400 or iSeries 400. This option allows you to export into the Sales History Export Header (OPPSH) and the Sales History Export Details (OPPSD) database files.

Step 3 - Downloading Sales History Data to a Forecast Package on Your PC

Once you create the AS/400 or iSeries 400 Export files, you must download OPPSH and OPPSD to your PC. To accomplish this you can use IBM's Client Access or any other file transfer program.

Step 4 - Importing Data into a Forecast Package, and Preparing Forecasts for Export

Using a forecast package you import your sales history data, create forecasts, and then prepare your Export file.

Step 5 - Uploading forecast Data to the AS/400 or iSeries 400

Once you complete your forecasts and save them, you upload them to the AS/400 or iSeries 400. This may involve a special program or a macro. You can upload to the Infinium MP Transfer file (MPPTF) or you can upload to the Infinium Common Services file (AMPTF).

Step 6 - Importing Forecasts

Import forecasts using the *Import Forecast* option in Infinium MP. This option imports data from either MPPTF or AMPTF depending on your screen entries.

Step 7 - Working with Imported Forecasts

Once you import forecasts, you can display, edit, print, post, and purge them using the *Work with Imported Forecasts* option.

Step 8 - Posting Forecast Records

You have the following two options for transferring records from the Imported Forecast file (MPPIF) to the Production Forecast file (MPPMF):

- Use the *Post Imported Forecast* option to transfer all unposted records to the Production Forecast file (MPPMF); specifically, to transfer all newly received records and records from previous uploads that were not posted (probably due to an error).
- Use the *Work with Imported Forecast* option to choose a subset of records from the Imported Forecast file (MPPIF) based on your selection criteria.

Step 9 - Purging Forecast Records

Using the *Purge Imported Forecast File* option, purge forecast records with a status of Posted if you have not already purged them.

Purge from either the *Purge Imported Forecast File* option, or use the purge feature in the *Work with Imported Forecast* option.

Completing Preliminary Setup

You must complete or verify the following setup before you download sales history information and upload forecasts:

- Set Infinium MP forecast controls
- Perform field mapping for the forecast package and possibly for Common Services

Infinium MP Controls

Prior to uploading any forecasts from a forecast package into Infinium MP, you must define some controls in Infinium MP. All fields are available at the entity level, and limited fields are at the company and warehouse levels.

Use the menu path below.

- *Control Files*
  - *Work with Entity* [WWE]

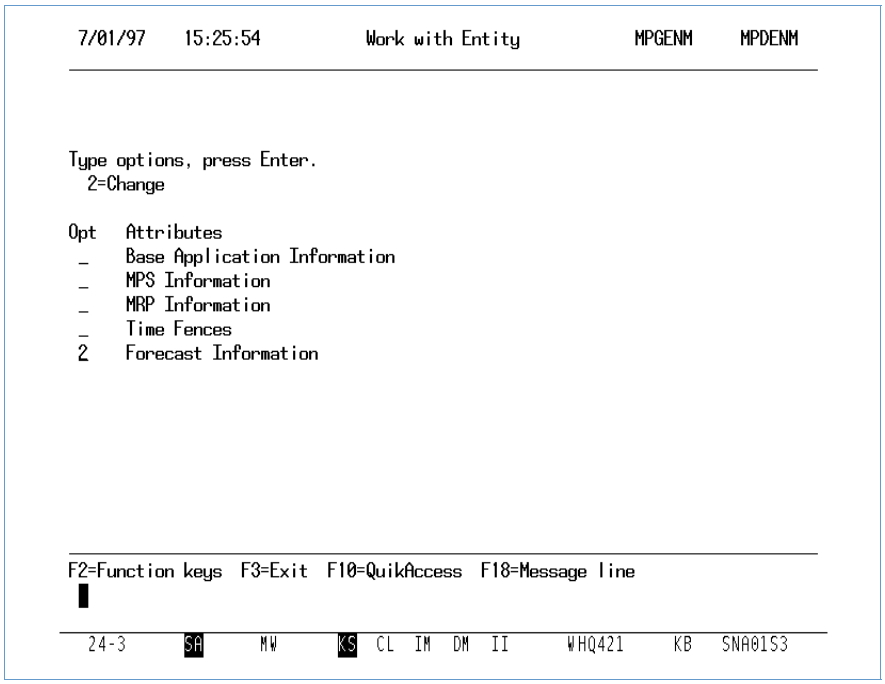


Figure D-3: Work with Entity Attribute selection screen

Defining Forecast Information Controls

To set forecast controls, type **2** next to the Forecast Information attribute and press Enter .

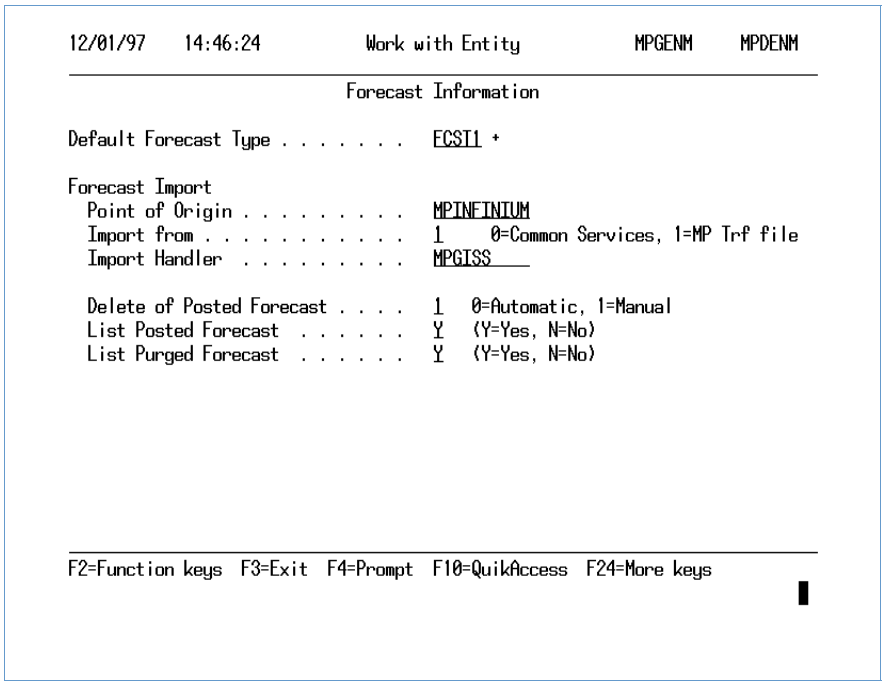


Figure D-4: Work with Entity Forecast Information screen

Defining Entity Forecast Information Controls

Use the fields on this screen to define forecast settings and defaults.

Default Forecast Type
Use this field to establish your default, valid forecast type. You can override this when you create forecasts in Infinium MP and when you edit any imported forecasts.

Point of Origin
This field identifies the source application of the data you import. This value defaults into the *Import Forecast* option. The system does not validate this field; it is for information purposes only.

Import from
Use this field to identify the normal storage location of the transferred data. This value defaults into the *Import Forecast* option. Type **0** if you transfer the forecast data to Common Services or type **1** if you transfer the forecast data to the Infinium MP Transfer file (MPPTF).

Import Handler
Use this field to identify the program to run that retrieves the transferred forecast data and populates the Imported Forecast file (MPPIF).

You need to specify a program name in the *Import Handler* field only if you are using a custom program. If you are not using a custom program, leave this field blank and the system either uses the MPGICS (Infinium Common Services) or MPGISS

(Infinium MP Transfer file) program. The system determines the program to use by your entry in the *Import from* field.

The value in the *Import Handler* field defaults into the *Import Forecast* option.

If you import from Common Services and use the Infinium MP Import Handler program, MPGICS, ensure that the forecast data corresponds to the Infinium Template for Forecast Imports provided by your forecast package. This might require changes to the Infinium Template. Discuss these changes with your Infinium Implementation Consultant.

Delete of Posted Forecast
Use this field to specify how the system handles the deletion of posted records within the Imported Forecast file (MPPIF).

You may choose to delete records automatically when you post them. To do this, type **0** in this field. To retain posted records after posting, type **1** in this field. This allows you to control when the system deletes records from the Imported Forecast file by manually using the purge feature.

If you type **0** in the *Import Forecast Delete of Posted Forecast* field and **Y** in the *Import Forecast List Purged Forecast* field, the system automatically generates the Imported Forecast Post and Purge report whenever you post forecasts. If you purge forecasts with the previously mentioned settings, the system generates the Imported Forecast Purge report. If you type **1** in the *Import Forecast Delete of Posted Forecast* field and **Y** in the *Import Forecast List Posted Forecast* field, the system automatically generates the Imported Forecast Post report whenever you post forecasts. A sample of these reports is in the “Infinium MP Reports” appendix.

List Posted Forecast
Type **Y** in this field to print a list of successfully posted forecasts after posting occurs.

List Purged Forecast
Type **Y** in this field to print a list of successfully deleted forecasts after the purge occurs.

If you access this attribute at the warehouse or company level, the *Forecast Import Point of Origin*, *Import from*, and *Import Handler* fields are not available.

Press Enter, then F3 and complete the Confirmation window with **1** to save your entries.

Forecast Package Operation and Field Mapping

You must map the PC forecast package fields to the Infinium MP fields prior to exporting forecasts. You must map fields in the forecast package. The following is an example of the template you can use to accomplish this mapping in your forecast package.

This mapping is a one time setup that you can establish for 90 days, 52 weeks, or 24 months.

Required Order	Forecast Application Field Example	Output Transactions	Target MP Field in the MPPMF File	MP Field Description	MP Field Size and Type	Required for Upload?	Required value (if any)
1	Item Code		MFPRD	Product	20 A	Yes	Must pass validation.
2	Location Code		MFWHSE	Location	5 A	No, if blank the system uses the user's default.	
3	UD01	User data fields 1-50	MFSIZE	Size Code	3 A	Yes, if Infinium CA Control files define products to require Size codes.	
4	UD02		MFTYPE	Forecast Type	5 A	No, if blank the system uses the default forecast type.	
5	UD03		MFCOMP	Company	5 A	No, if blank the system uses the user default company.	
6	UD04		MFUA1	User defined alpha 1	Variable	Depends on user control settings in Infinium CA.	Depends on user setup in Infinium CA.
7	UD05		MFUA2	User defined alpha 2			
8	UD06		MFUA3	User defined alpha 3			

Required Order	Forecast Application Field Example	Output Transactions	Target MP Field in the MPPMF File	MP Field Description	MP Field Size and Type	Required for Upload?	Required value (if any)
9	UD07		MFUA4	User defined alpha 4			
10	UD08		MFUA5	User defined alpha 5			
11	UD09	User data fields	MFUN1	User defined numeric 1	Variable	Depends on user control settings in Infinium CA.	Depends on user setup in Infinium CA.
12	UD10		MFUN2	User defined numeric 2			
13	UD11		MFUN3	User defined numeric 3			
14	UD12		MFUN4	User defined numeric 4			
15	UD13		MFUN5	User defined numeric 5			
16	UD14		MFUD1	User defined date 1			
17	UD15		MFUD2	User defined date 2			
18	UD16		MFUD3	User defined date 3			
19	UD16		MFUD4	User defined date 4			
20	UD17		MFUD5	User defined date 5			
21	UOM	Unit of Measure	MFUM	*Forecast Qty UM*	4 A	No, if blank the system	Must pass validation.

Required Order	Forecast Application Field Example	Output Transactions	Target MP Field in the MPPMF File	MP Field Description	MP Field Size and Type	Required for Upload?	Required value (if any)
						uses the product inventory unit of measure.	
22	Forecast Quantity	Forecast quantity array (varies based on standard 90 day, 52 week, or 24 month forecasts or any user defined time frame)	MFQTY	*Forecast Quantity*	13.4 N	Yes	Must be a non-negative value.

Common Services Operation and Field Mapping

The AS/400 or iSeries 400 needs to receive your Export file from your forecast package. You can accomplish this with a custom macro or a Visual Basic program. You can upload the file to either the Advanced Planning Transfer file (MPPTF) or the Commons Services file (AMPTF). Once you complete the upload, you use Infinium MP's *Import Forecasts* option to import the data from either source.

You must save the forecast export file in a comma delimited/text only format. You need to add the member to AMPTF using MPvvvxxxx. The ' vvv' represents your current version number of Infinium MP. The "xxxx" represents your specific naming convention. This naming convention assists in facilitating a call from Infinium MP to retrieve the data from the membered file. Review the Common Services diagram for further information.

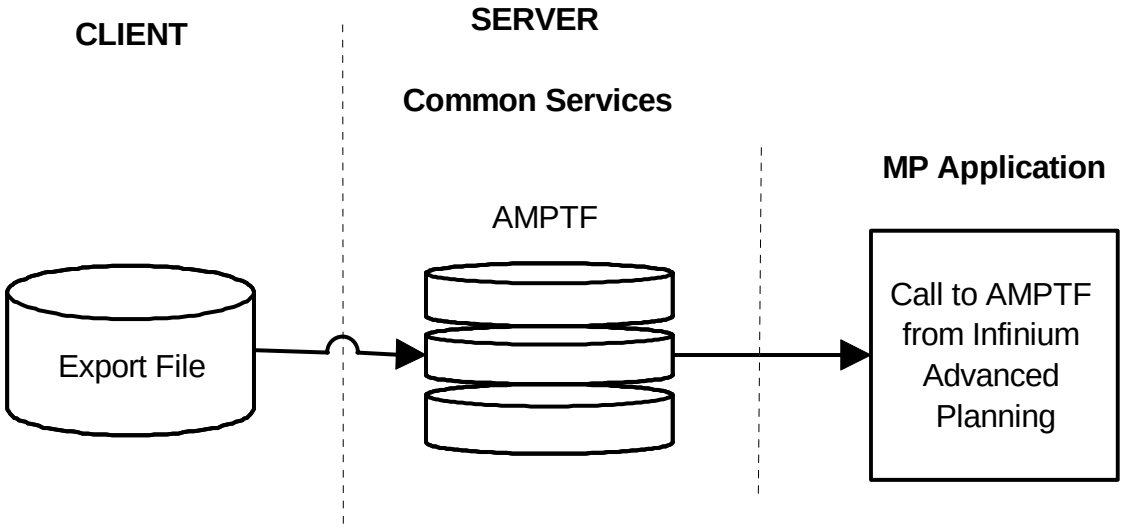


Figure D-5: Common Services

Infinium MP uses the mapping shown in the next table to convert the Common Services fields to Infinium MP fields. This conversion occurs when you import forecasts. If you plan to use Common Services, be sure to save your Export file using the AMPTF fields. Then, when Infinium MP calls Common Services (when you execute the *Import Forecasts* option), the system maps these fields to the Infinium MP fields.

Field Sequence in AMPTF	Beg Pos	End Pos	AMPTF Field Name	Size and Type	Target MP Field	MP Size and Type	MP Field Description	Required for Upload?	Required Value (if any)
44	73	77	TF51	5 A	IFCOMP	5 A	*Company*	No	If blank, the system uses the user‘ s default company.
45	78	82	TF52	5 A	IFWHSE	5 A	*Warehouse*	No	If blank, the system uses the user’s default warehouse.
109	582	601	TF201	20 A	IFPRD	20 A	*Product*	Yes	Must be a valid product.
34	43	45	TF31	3 A	IFSIZE	3 A	*Size*	Yes, if Infinium CA Control files are set to require this.	Must be a valid Size code.
164	2183	2187	TF901	9.0 N	IFDATE	8.0 N	*Forecast Date (YMD 8)*	Yes	The system automatically populates this field.
46	83	87	TF53	5 A	IFTYPE	5 A	*Forecast Type*	No	If blank, the system uses the default forecast type. Must be a valid forecast type.
248	2740	2747	TF1541	15.4 N	IFQTY	13.4 N	*Quantity*	Yes	Must be non-negative.
47	88	92	TF54	5 A	IFUM	4 A	*UM*	No	If blank, the system uses the product’s inventory unit of measure.

Field Sequence in AMPTF	Beg Pos	End Pos	AMPTF Field Name	Size and Type	Target MP Field	MP Size and Type	MP Field Description	Required for Upload?	Required Value (if any)
121	822	851	TF301	30 A	IFUA1	30 A	*UDF Alpha 1*	Depends on user control settings in Infinium CA.	Depends on user setup in Infinium CA.
122	852	881	TF302	30 A	IFUA2	30 A	*UDF Alpha 2*		
123	882	911	TF303	30 A	IFUA3	30 A	*UDF Alpha 3*		
124	912	941	TF304	30 A	IFUA4	30 A	*UDF Alpha 4*		
125	942	971	TF305	30 A	IFUA5	30 A	*UDF Alpha 5*		
249	2748	2755	TF1542	15.4 N	IFUN1	15.4 N	*UDF Numeric 1*		
250	2756	2763	TF1543	15.4 N	IFUN2	15.4 N	*UDF Numeric 2*		
251	2764	2771	TF1544	15.4 N	IFUN3	15.4 N	*UDF Numeric 3*		
252	2772	2779	TF1545	15.4 N	IFUN4	15.4 N	*UDF Numeric 4*		
253	2780	2787	TF1546	15.4 N	IFUN5	15.4 N	*UDF Numeric 5*		
165	2188	2192	TF902	9.0 N	IFUD1	8.0 N	*UDF Date 1*		
166	2193	2197	TF903	9.0 N	IFUD2	8.0 N	*UDF Date 2*		
167	2198	2202	TF904	9.0 N	IFUD3	8.0 N	*UDF Date 3*	Depends on user control settings in Infinium CA.	Depends on user setup in Infinium CA.
168	2203	2207	TF905	9.0 N	IFUD4	8.0 N	*UDF Date 4*		
169	2208	2212	TF906	9.0-N	IFUD5	8.0 N	*UDF Date 5*		

It is important to understand specific requirements related to this data transfer. Your custom program or macro must read the PC file record, retrieve the first field (product/item), move product/item to TF01, and so on, and then write the record to AMPTF. One PC file record has many quantity fields. However, one AMPTF record has only one quantity field. This means your program or macro must read one PC file record and add as many AMPTF records as there are quantity fields in that PC file record.

For more information on using Common Services, refer to the *Common Services Technical Documentation*.

Bypassing Common Services

If you do not use Common Services to receive your Export file, and you want to use the MP Transfer file, you do not need a custom program or macro.

The simplest way to achieve the transfer is to use FTP (Internet's facility of file transfer protocol). Using FTP, you populate MPPTF with the PC file. Otherwise, you can use IBM's Client Access or any custom program on the PC.

Unlike the Common Services transfer, the system does not use one PC record to generate multiple records in MPPTF. Basically, that is why you do not need a special conversion program. You take one PC record (commas and all) and update its MPPTF record.

Exporting Sales History on the AS/400 or iSeries

If you use a forecast package, you can export sales history from Infinium OP to your AS/400 or iSeries and then using a file transfer program you can download the data to the forecast package. You can use the sales history data to calculate future sales demand.

The export is not product specific. For example, the Sales History Download Details file (OPPSD) contains records for all products sold during the fiscal year.

Use the menu path below.

- Infinium OP
- *Order Processing*
- *Order Processing Utilities*
  - *Export Sales History* [ESH]

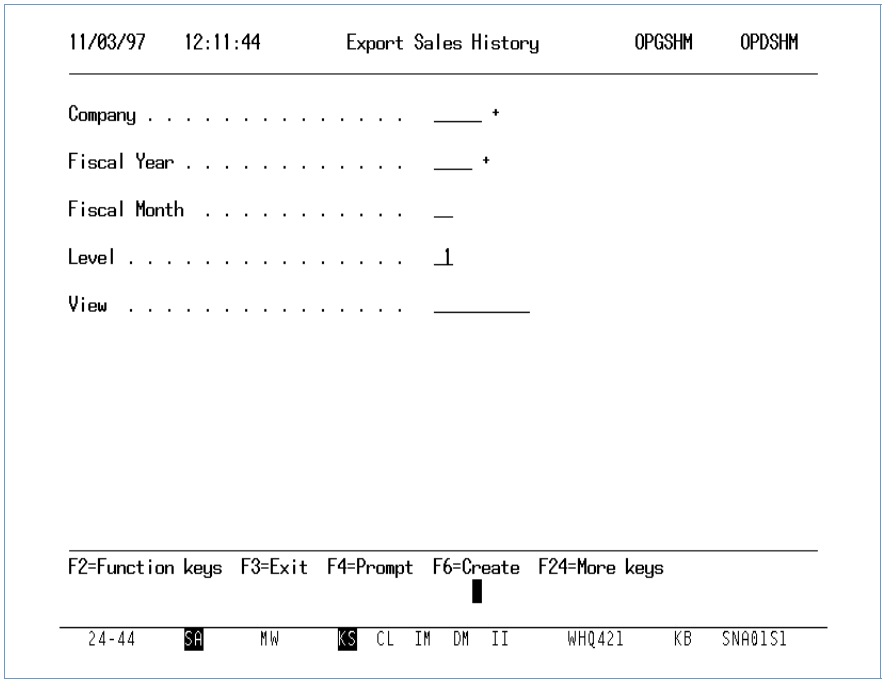


Figure D-6: Export Sales History screen

The system requires entries in all the fields on this screen except for the *Fiscal Month* field. If you leave the *Fiscal Month* field blank, the system includes all months for the entry in the *Fiscal Year* field for the export.

Level

The *Level* field defaults to **1**. Level 1 contains the greatest amount of demand detail history. Level 2 is descriptive data plus other information. Level 2 uses Level 1 to determine information.

View

The *View* field is the identifier for this particular set of data. Any entry is acceptable.

The system only uses values in the *Level* and *View* fields within your forecast package. These values do not affect data selected for export.

Prior to exporting, the system clears the OPPSH and OPPSD files of all existing records. OPPSH consists of the selection criteria you specified on the screen. OPPSD consists of the Sales History data that the system selected according to the criteria you specified.

The export process adds a record to the Sales History Export Header file, OPPSH, which contains your export specifics. Understand that this file has exactly one record.

Press F6 to export the file.

The system only considers records with a matching Company code for populating the Sales History Export Details file (OPPSD). If you specified a month as part of export criteria, the system creates exactly one record in the OPPSD file for each key value with a matching *Company* field from the Sales History file (SASALMST). Key value criteria includes *Company*, *Warehouse*, *Salesman 1*, *Salesman 2*, *Customer*, *Ship-to*, *Product*, *Size*, and *Market Code*. If you do not specify a month, the system creates twelve or thirteen records from the Sales History file; one for each period of the year.

WARNING

After you export sales history, you must always download this data to your PC and then import it into your forecast package. If you run the *Export Sales History* option more than once without downloading, the Export files (OPPSH and OPPSD) have data corresponding to the latest selection, and data selected by previous export runs is lost.

Downloading Sales History Data to the Forecast Application

Once you create the AS/400 or iSeries Export files, you must download the files to your PC. To accomplish this, use IBM's Client Access or any other file transfer program.

The Sales History downloaded files (OPPSH and OPPSD) are in the Infinium OP Database library. The download process using your forecast package involves identifying the file on the server, selecting data, and saving the selected data on the PC. In your forecast package, save your data in comma delimited format. You must repeat these steps separately for the two exported files.

In the forecast package when you select data from OPPSD, you may select only a subset of data, for instance for a specific product.

Refer to your file transfer program documentation for further information.

You can select data for a specific product.

Importing Data into Your Forecast Package and Preparing Forecasts for Export

Use the *Import* function in your forecast package to retrieve the downloaded data from OPPSH and OPPSD into your forecast package. You can perfect forecasts using various functions available in your forecast package.

When your forecast is acceptable and ready to use in Infinium MP, you must save your forecast as a comma delimited/text only file on the PC. Save your forecast using the Export function in your forecast package. Infinium MP requires that as part of the Export specification, you save the field names as the first record in the Export file. Ultimately, the data in the Export file will go to the Infinium MP Forecast file (MPPMF).

Uploading Forecast Package Data to the AS/400 or iSeries

Once you complete your forecasts in your forecast package and save them, you can upload them to the AS/400 or iSeries. Again, you can use a custom program or macro to accomplish this. Upload to the Infinium MP Transfer file (MPPTF), or upload to the Infinium Application Manager Common Services file (AMPTF).

Importing Forecasts

Use the *Import Forecast* option to import forecasts from the Common Services Transfer file (AMPTF), or the Advanced Planning Transfer file, MPPTF. These forecasts then go into the Imported Forecast file (MPPIF) which is an intermediate file. Specifically, the system requires this because one Export file record must be split into multiple forecast records and because forecast dates are not part of data in an export record.

The Imported Forecast file (MPPIF) is a copy of the Infinium MP Forecast file (MPPMP), with some additional fields for control purposes. These include the *Status of the Record*, *Transaction (or Batch) Identifier*, *Date*, and *Time* fields.

Make sure no other user is performing any *Forecast Import* options when you execute this option. *Forecast Import* options include: *Import Forecasts*, *Work with Imported Forecast*, *Post Imported Forecast*, and *Purge Imported Forecast File*.

Use the menu path below.

- *Forecast Import*
  - *Import Forecast* [IF]

Importing Forecasts from Your Forecast Package

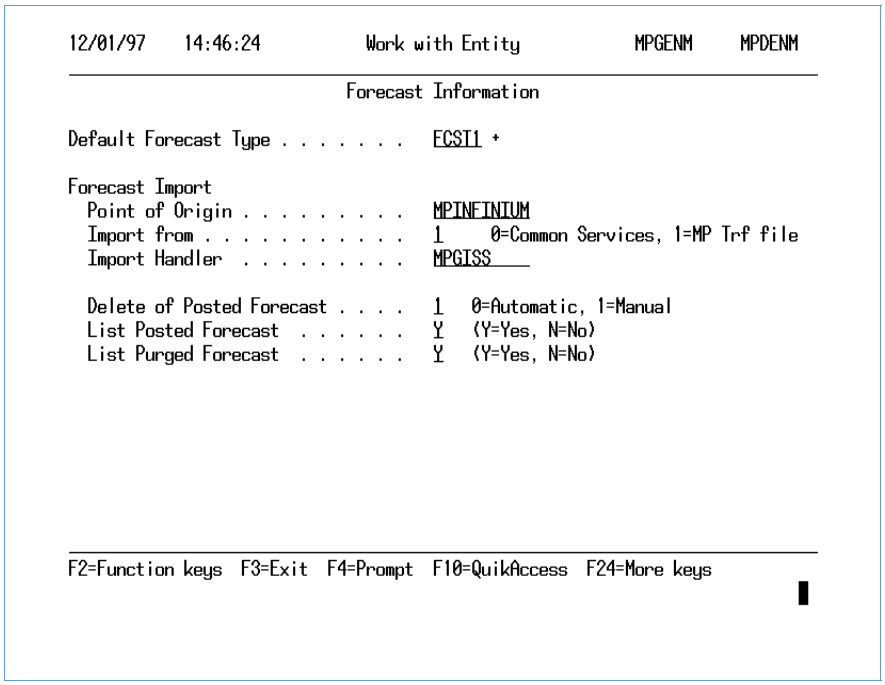


Figure D-7: Import Forecast screen

Complete the fields below.

Point of Origin
This field identifies the source application of the data you import. This value defaults from the Infinium MP Control files. The system does not validate this field. This field is for information purposes only. Use this field to distinguish between forecasts created in your forecast application and forecasts created in Infinium MP.

Import from
Use this field to identify the normal storage location of the transferred data. This value defaults from the Infinium MP Control files. Type **0** if you have transferred the forecast data into Common Services, or type **1** if you transfer the forecast data into the Infinium MP Transfer file (MPPTF).

Import Handler
Use this field to identify the program to run that should retrieve the transferred forecast data and populate the Imported Forecast file, MPPIF.

You need to specify a program name in the *Import Handler* field only if you are using a custom program. If you are not using a custom program, leave this field blank and the system either uses the MPGICS or MPGISS program. The system determines the program to use by your entry in the *Import from* field.

The value in the *Import Handler* field defaults into the *Import Forecast* option.

If your data source is the MP Transfer file (MPPTF) be aware that the system clears this file of all data after this import, even if there are errors.

Verify the default entries on the screen and change them if necessary. Press F6 to execute the import. Press F3 to cancel and exit.

If you are using Common Services, a second Forecast Import screen displays. This screen displays all AMPTF members that belong to Infinium MP applications. From this screen you can make the following entries:

1	Type **1** to select a member to retrieve data from in order to populate MPPIF and to retain the member after processing
2	Type **2** to select a member to retrieve data from in order to populate MPPIF and to clear the member after the system retrieves the data
3	Type **3** to copy data from the selected member into another member *
4	Type **4** to delete a member*
5	Type **5** to display all data records in the members

* These functions take you to additional screens. For more information on using Common Services, refer to the *Common Services Technical Documentation*.

Press Enter after you make your selection.

Regardless of your data source, the system automatically generates the Import Forecast Exception report when you perform this option. The report heading differs by data source. The data source is either the Import Forecast Exceptions report or the Import Forecast via Common Services Exception report. The system also generates the Imported Forecast Listing report. You can also generate the Imported Forecast Listing report by pressing F8 on the Work with Imported Forecast screen. Samples of these reports follow and they are also in the “Infinium MP Reports” appendix.

MPGISS MPTIFL I M P O R T E D F O R E C A S T L I S T I N G PAGE 1
6/11/00 17:26:22 PG

CO	WHSE	PRODUCT	SIZE	FCST TYPE	FORECAST DESCRIPTION	FORECAST DATE	QUANTITY	UM	STATUS	ORIGIN	USER ID	TRANS ID	TRANSACTION DATE
COMP2	WHSE2	ITEM21	EA	FUTUR		00970601	17000.0000	KG	NEW	ANALYST 01	PG	024786	06-11-2000
						00970701	19000.0000	KG					
						00970801	19000.0000	KG					
						00970901	22000.0000	KG					
						00971001	16000.0000	KG					
COMP2	WHSE2	ITEM22	EA	PROMO		00970601	700.0000	KG					
						00970701	650.0000	KG					
						00970801	600.0000	KG					
						00970901	550.0000	KG					
COMP4	WHSE4	ITEM41	EA	FUTUR		00970601	17000.0000	KG					
						00970701	19000.0000	KG					
						00970801	19000.0000	KG					
						00970901	22000.0000	KG					
						00971001	16000.0000	KG					
COMP4	WHSE4	ITEM42	EA	PROMO		00970601	700.0000	KG					
						00970701	650.0000	KG					
						00970801	600.0000	KG					
						00970901	550.0000	KG					
						00971001	500.0000	KG					
COMP5	WHSE5	ITEM51	EA	FUTUR		00970601	17000.0000	KG					
						00970701	19000.0000	KG					
						00970801	19000.0000	KG					
						00970901	22000.0000	KG					
						00971001	16000.0000	KG					

***** RECORDS SELECTED . : 00018
***** RECORDS IMPORTED . : 00024

********** END OF REPORT **********

This is the Import Forecast using the Infinium MP Transfer file – Imported Forecasts Listing. This listing displays all successfully imported forecast records. Remember the *Origin* and *Transaction ID* field values. In order to subset using the transaction ID in the *Work with Imported Forecast* option, you must obtain that information from this report.

MPGICS MPTIFL I M P O R T E D F O R E C A S T L I S T I N G PAGE 1
6/12/00 12:00:54 PG

CO	WHSE	PRODUCT	SIZE	FCST TYPE	FORECAST DESCRIPTION	FORECAST DATE	QUANTITY	UM	STATUS	ORIGIN	USER ID	TRANS ID	TRANSACTION DATE
INF	INF	PROD20	LB	*RR01		20000101	100.0000	LB	NEW	ANALYST 05	PG	025136	06-12-2000
						20000104	100.0000	LB					
						20000105	7000.0000	LB					
						20000106	5000.0000	LB					
						20000107	15000.0000	LB					
						20000110	250.0000	LB					
						20000114	200.0000	LB					
						20000121	10000.0000	LB					
						20000131	400.0000	LB					
						20000214	200.0000	LB					
						20000228	500.0000	LB					
INF	INF	PROD21	LB	FUTUR		20000731	5.0000	LB					
						20000801	10.0000	LB					
						20000802	7.0000	LB					
						20000803	12.0000	LB					
						20000807	15.0000	LB					
						20000814	25.0000	LB					
						20000821	20.0000	LB					
						20000828	22.0000	LB					
						20000901	50.0000	LB					
						20001001	50.0000	LB					
						20001101	75.0000	LB					
						20000315	200.0000	LB					
						20000331	250.0000	LB					
						20000401	600.0000	LB					
						20000413	500.0000	LB					
INF	INF	PROD20	LB	RETAL		20000801	200.0000	LB					
						20000802	100.0000	LB					
						20000803	250.0000	LB					
						20000804	300.0000	LB					
						20000805	100.0000	LB					
						20000815	1000.0000	LB					
						20000831	1500.0000	LB					
INF	INF	PROD23	LB	TFR		20001201	10.0000	LB					
						20001202	10.0000	LB					
						20001203	10.0000	LB					
						20001204	10.0000	LB					
						20001205	10.0000	LB					
						20001206	10.0000	LB					
INF	INF	PROD25	LB	*RR01		20000501	2000.0000	LB					
						20000502	1000.0000	LB					
INF	INF	BLSPRODUCT	N/A	SPEC		20001223	10.0000	LB					
						20001230		LB					
						20000106	10.0000	LB					
INF	INF	PRODUCT5	EA	FUTUR		20000115	1000.0000	EA					
INF	INF	PROD11		*PG03		20001101	50.0000	LB					
INF	INF	PROD11		*PG03		20001201	50.0000	LB	NEW	ANALYST 05	PG	025136	06-12-2000
INFINIUM				TFR		00000000							
						00000000							

***** RECORDS SELECTED . : 00050
***** RECORDS IMPORTED . : 00049

********** END OF REPORT **********

This is the Import Forecast using AM Common Services – Imported Forecast Listing report. This report displays all successfully imported forecast records.

```
MPGISS     MPTIFE                              I M P O R T   F O R E C A S T                                                  PAGE    1
 6/11/00   15:10:44                                  EXCEPTIONS REPORT                                                          PG

-------------------------------------------------------------------------------------------------------------------------------------
     IMPORTED FORECAST FILE, MPPIF, CANNOT BE ALLOCATED.
                           ***** NO RECORDS SELECTED
                                      ********** END OF REPORT **********
```

This is the Import Forecast using the Infinium MP Transfer file – Exceptions report. In this case, the system cannot allocate the Imported Forecast file and no further processing occurs. The system retains data in the Infinium MP Transfer file.

```
MPGISS     MPTIFE                                        I M P O R T   F O R E C A S T                                        PAGE    1
 6/11/00   15:21:10                                            EXCEPTIONS REPORT                                                PG
-------------------------------------------------------------------------------------------------------------------------------------

MP TRANSFER FILE, MPPTF, CANNOT BE ALLOCATED.
                           ***** NO RECORDS SELECTED
                                           ********** END OF REPORT **********
```

This is the Import Forecast using the Infinium MP Transfer file – Exceptions report. In this case, the system cannot allocate the Infinium MP Transfer file. No further processing occurs and data remains in the Infinium MP Transfer file.

```
------------------------------------------------------------------------------------------------------------------------------------
 TRANSACTION NUMBER:      1
 ItemCode,Location,UD01,UD02,UD03,UD04,UD05,UD06,UD07,UD08
                                                  THERE MUST BE AT LEAST ONE QUANTITY FIELD.  MINIMUM NUMBER OF FIELDS EXPECTED:   12
; AVAILABLE:    9
                                                  ALL THE ASSOCIATED DATA RECORDS ARE REJECTED:
 ITEM11,11,GL,RETAL,    1,,,,,,GL,16000,15500,15600,15550,15410,15264,18625,15772,11989,21982,15813,15059
 ITEM12,11,EA,RETAL,    1,,,,,,EACH,17217,19275,39433,22884,16410,18264,28625,22772,24989,21982,21813,21059
 ITEM13,11,LB,RETAL,    1,,,,,,LB,1000,1000,1100,900,950,950,950,900,950,950,900,900
------------------------------------------------------------------------------------------------------------------------------------
 TRANSACTION NUMBER:      2
 ITEM22,WHSE2,EA,PROMO,COMP2,,,,,,KG,700,650,600,550,5?0
                                                  CANNOT DETERMINE QUANTITY.     QUANTITY IN ERROR:  5?0              FOR PERIOD:   5
------------------------------------------------------------------------------------------------------------------------------------
 TRANSACTION NUMBER:      3
 IT,EM31,WHSE3,EA,FUTUR,COMP3,,,,,,KG,17000,19000,19000,22000,16000
                                                  FIELDS MISMATCH.     TOTAL FIELD NAMES:  016     TOTAL DATA FIELDS:  017
------------------------------------------------------------------------------------------------------------------------------------
---------------------------------------------------------------
                            ***** RECORDS PROCESSED . :  00018
                            ***** TOTAL TRANSACTIONS  :  00005
                            ***** TOTAL DATA RECORDS  :  00009
                                                        ********** END OF REPORT **********
```

This is the Import Forecast using the Infinium MP Transfer file – Exceptions report. In this example, the files have been successfully allocated and the transfer is complete. The system clears the Infinium MP Transfer file of all data.

```
MPGICS     MPTIFE              I M P O R T   F O R E C A S T   V I A   C O M M O N   S E R V I C E S                    PAGE    1
 6/12/00   12:07:20                              EXCEPTIONS REPORT                                                          PG

-------------------------------------------------------------------------------------------------------------------------------
     IMPORTED FORECAST FILE, MPPIF, CANNOT BE ALLOCATED.
                           ***** NO RECORDS SELECTED
                                                                          ********** END OF REPORT **********
```

This is the Import Forecast using AM Common Services – Exceptions report. In this example, the system could not allocate the Imported Forecast file and no further processing occurs.

```
MPGICS     MPTIFE                            I M P O R T   F O R E C A S T   V I A   C O M M O N   S E R V I C E S          PAGE    1
 6/12/00   12:04:02                                                EXCEPTIONS REPORT                                          PG
-------------------------------------------------------------------------------------------------------------------------------

SELECTED MEMBER, MP001D01   , IN COMMON SERVICES FILE, AMPTF, CANNOT BE ALLOCATED.
                           ***** NO RECORDS SELECTED
                                                                          ********** END OF REPORT **********
```

This is the Import Forecast using AM Common Services – Exceptions report. In this example, the system cannot allocate the Infinium MP Transfer file and no further processing occurs.

```
MPGICS     MPTIFE                  I M P O R T   F O R E C A S T   V I A   C O M M O N   S E R V I C E S                  PAGE    1
 6/12/00   12:00:54                                                EXCEPTIONS REPORT                                          PG
-------------------------------------------------------------------------------------------------------------------------------
     RECORD NO.  ERROR
          50     DATA IN THIS RECORD CAUSED PROGRAM AMGCRDCS TO END ABNORMALLY.     TRANSFER PROCESS TERMINATED.

                          ***** RECORDS PROCESSED . :  00050
                          ***** RECORDS IN ERROR  . :  00001
                                                                  ********** END OF REPORT **********
```

This is the Import Forecast using AM Common Services – Exceptions report. In this case the system successfully allocates the file and the transfer occurs.

Working with Imported Forecasts

Use the *Work with Imported Forecast* option to work with a subset of all the imported forecast records.

Use the menu path below.

- *Forecast Import*
  - *Work with Imported Forecast* [WWIF]

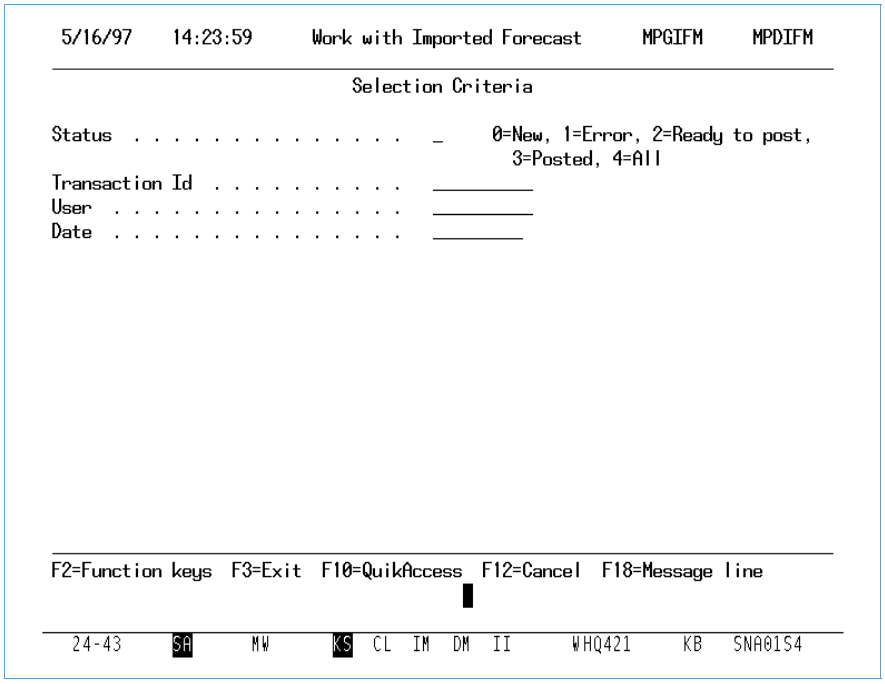


Figure D-8: Work with Imported Forecast Selection Criteria screen

Use the fields on this screen to tailor your display of forecast records.

Status
Use this field to customize your display of forecast records. The system displays the records described, if you type the following code:

0	Only new records
1	Records marked as erroneous
2	Records that are not new and are not in error

3	Records that are all already posted
4	All records, regardless of status

You can also use the *Transaction ID*, *User*, and *Date* fields to customize your display. You can obtain these values from the Imported Forecast Listing you generate at the time of import

Once you complete your selection criteria, press Enter.

Editing Forecasts

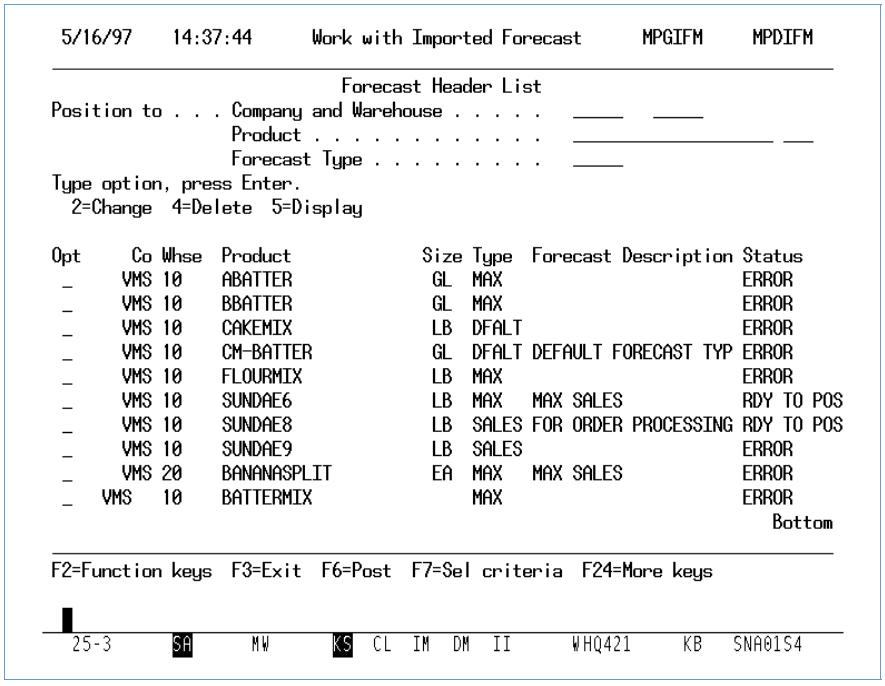


Figure D-9: Forecast Header List screen

The information that displays on this screen is the forecast header data determined by your entries on the Work with Imported Forecast selection screen. Use the *Opt* column to select a record for editing, deletion, or display. If you select a record for deletion, the system displays a confirmation screen.

Several function keys are also available. To print all records, press F8 .

To post all records, press F6 and to purge all records, press F22 . Both the posting and purging functions take you to confirmation screens. This appendix discusses these screens later.

At any point you can change your selection criteria by pressing F7 and changing your selection entries.

The first screen discussed is the Forecast Identification screen. To access this screen, select a record by typing **2** next to it and press Enter .

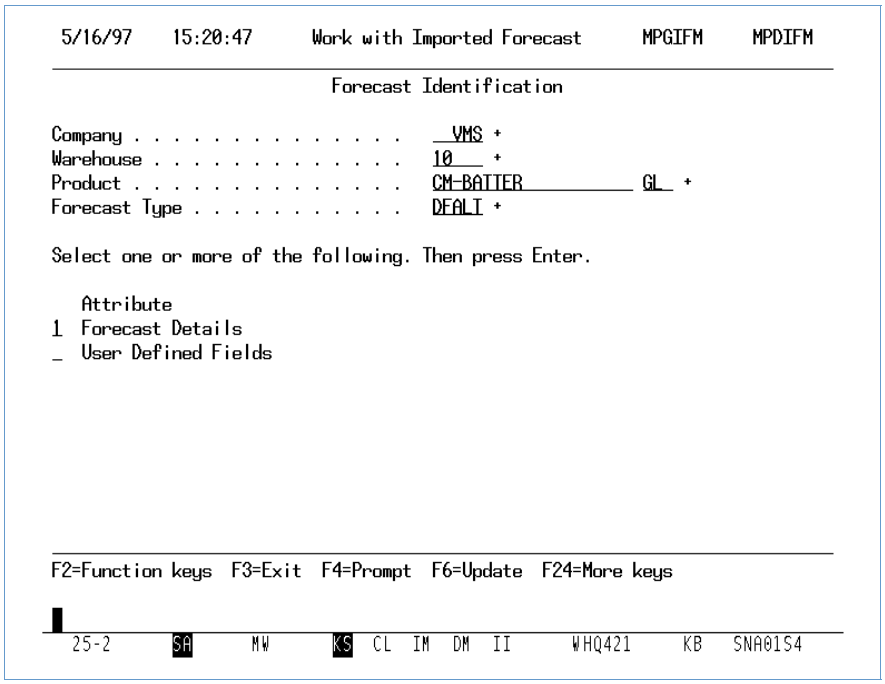


Figure D-10: Forecast Identification screen

Forecast Identification Attributes

You can change any of the values at the top of the screen. These fields must contain valid entries before you can proceed to the various attributes.

To select one of the attributes, type any character beside the attribute and press Enter. This appendix discusses the Forecast Details attribute first and then the User Defined Fields attribute.

After you have made your edits to the attribute screens and pressed Enter, the system returns you to the Forecast Identification screen. Press F6 to save your entries. To save entries with errors, press F21.

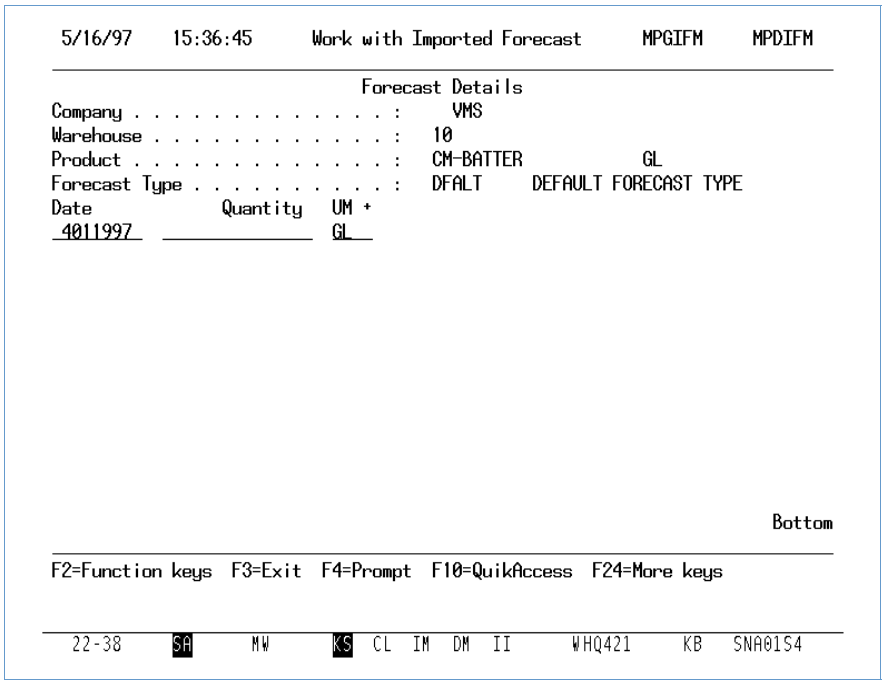


Figure D-11: Forecast Details screen

Forecast Details

Access this screen by selecting the Forecast Details attribute on the Forecast Identification screen. On this screen you can alter a forecast by changing the *Date*, *Quantity*, and *UM* fields. Press Enter to save your entries.

You can remove one or more forecast details by pressing FieldExit on the fields. If you press FieldExit across all detail fields, the system deletes the forecast record.

You can not add a forecast to the system from this screen.

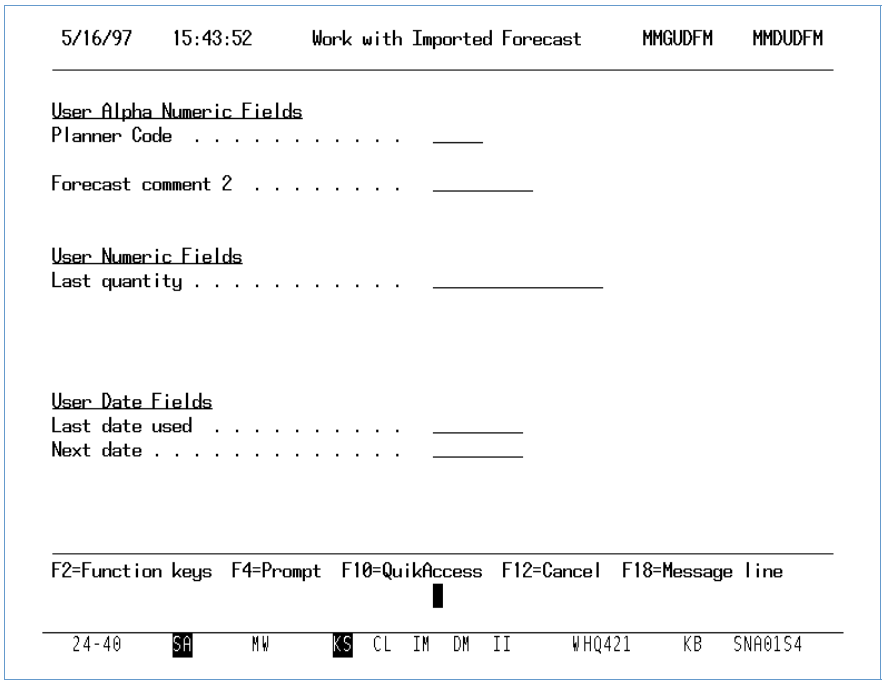


Figure D-12: User Defined Fields screen

User Defined Fields

Access this screen by selecting the User Defined Fields attribute on the Forecast Identification screen.

You can edit your forecast user defined fields on this screen. Press Enter to save your entries.

Establish user defined fields for the Infinium MP Forecast file, MPPMF, using the *Work with User Defined Fields* option in Infinium CA.

Displaying Forecasts

To display a forecast record, type **5** beside it and press Enter .

```
 5/19/97      8:05:02      Work with Imported Forecast      MPGIFM     MPDIFM
_____________________________________________________________________________
                              Forecast Header List
Position to . . . Company and Warehouse . . . . .    _____   _____
                  Product . . . . . . . . . . . .    ____________________ ___
                  Forecast Type . . . . . . . . .    _____
Type option, press Enter.
  2=Change  4=Delete  5=Display

Opt     Co Whse  Product             Size Type  Forecast Description Status
 5     VMS 10    ABATTER              GL  MAX                        ERROR
 _     VMS 10    BBATTER              GL  MAX                        ERROR
 _     VMS 10    CAKEMIX              LB  DFALT                      ERROR
 _     VMS 10    CM-BATTER            GL  DFALT DEFAULT FORECAST TYP ERROR
 _     VMS 10    FLOURMIX             LB  MAX                        ERROR
 _     VMS 10    SUNDAE6              LB  MAX   MAX SALES            RDY TO POS
 _     VMS 10    SUNDAE8              LB  SALES FOR ORDER PROCESSING RDY TO POS
 _     VMS 10    SUNDAE9              LB  SALES                      ERROR
 _     VMS 20    BANANASPLIT          EA  MAX   MAX SALES            ERROR
 _   VMS   10    BATTERMIX                MAX                        ERROR
                                                                        Bottom
_____________________________________________________________________________
F2=Function keys  F3=Exit  F6=Post  F7=Sel criteria  F24=More keys

   24-24     SA      MW       KS  CL  IM  DM  II      WHQ421     KB    S2KCTLS1
```

Figure D-13: Forecast Header List screen

After you select a forecast record, the system displays the Forecast Identification screen.

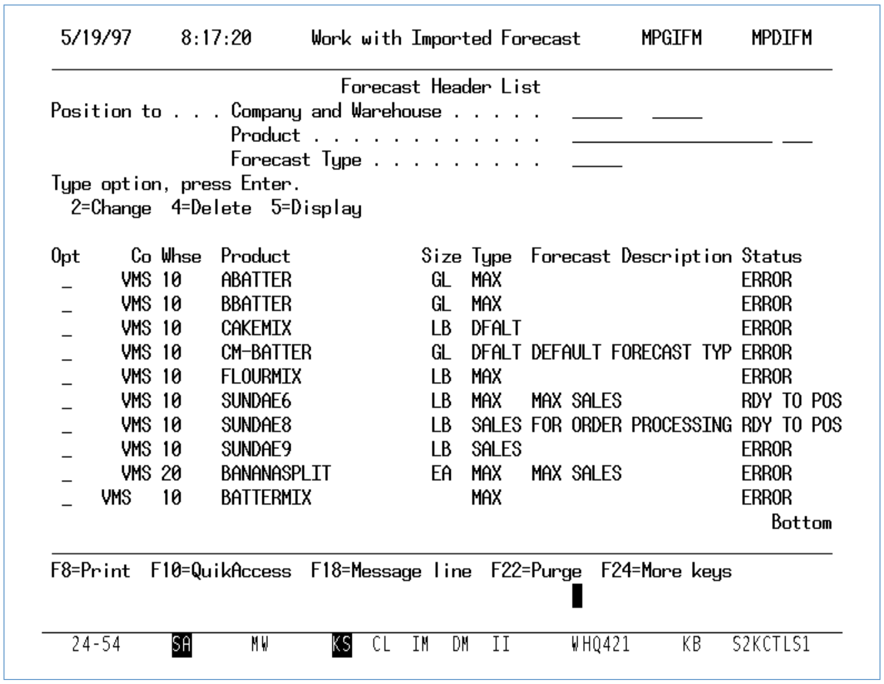
```
 5/19/97      8:10:56      Work with Imported Forecast      MPGIFM     MPDIFM
_____________________________________________________________________________
                             Forecast Identification

Company . . . . . . . . . . . . . :     VMS
Warehouse . . . . . . . . . . . . :   10
Product . . . . . . . . . . . . . :   ABATTER                GL
Forecast Type . . . . . . . . . . :   MAX

Select one or more of the following. Then press Enter.

   Attribute
_  Forecast Details
_  User Defined Fields

_____________________________________________________________________________
F2=Function keys  F3=Exit  F10=QuikAccess  F12=Cancel  F18=Message line

   24-2      SA      MW       KS  CL  IM  DM  II      WHQ421     KB    S2KCTLS1
```

Figure D-14: Forecast Identification screen

From this screen you can type any character next to either or both attributes and display all information regarding the forecast. Press Enter after you select an attribute or attributes.

Deleting Forecasts

To delete a forecast, type **4** beside it and press Enter .



```
 5/19/97     8:17:20      Work with Imported Forecast       MPGIFM     MPDIFM

                               Forecast Header List
Position to . . . Company and Warehouse . . . . .   ____  ____
                  Product . . . . . . . . . . . .   __________________ __
                  Forecast Type . . . . . . . . .   ____
Type option, press Enter.
  2=Change  4=Delete  5=Display

Opt      Co Whse  Product              Size Type  Forecast Description Status
 _      VMS 10    ABATTER               GL  MAX                        ERROR
 _      VMS 10    BBATTER               GL  MAX                        ERROR
 _      VMS 10    CAKEMIX               LB  DFALT                      ERROR
 _      VMS 10    CM-BATTER             GL  DFALT DEFAULT FORECAST TYP ERROR
 _      VMS 10    FLOURMIX              LB  MAX                        ERROR
 _      VMS 10    SUNDAE6               LB  MAX   MAX SALES            RDY TO POS
 _      VMS 10    SUNDAE8               LB  SALES FOR ORDER PROCESSING RDY TO POS
 _      VMS 10    SUNDAE9               LB  SALES                      ERROR
 _      VMS 20    BANANASPLIT           EA  MAX   MAX SALES            ERROR
 _    VMS    10   BATTERMIX                 MAX                        ERROR
                                                                          Bottom

F8=Print  F10=QuikAccess  F18=Message line  F22=Purge  F24=More keys

  24-54      SA      MW      KS  CL  IM  DM  II     WHQ421     KB   S2KCTLS1
```

Figure D-15: Forecast Header List screen

After you press Enter , the system displays the Confirm Delete of Forecast Records screen.

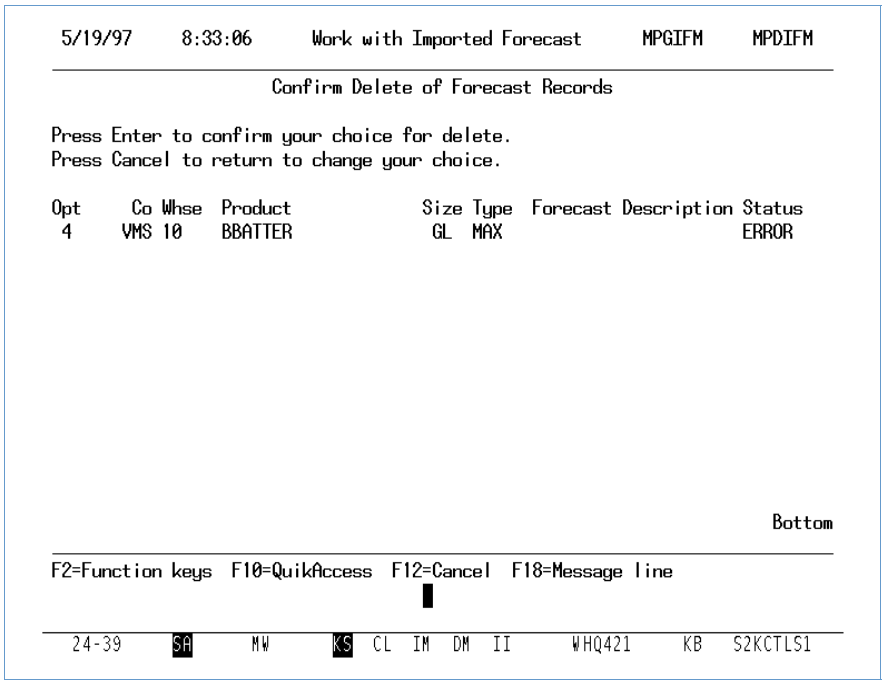


Figure D-16: Confirm Delete of Forecast Records screen

To continue with the deletion process, press Enter and to cancel press F12 .

Printing Forecasts

To print forecasts, press F8 . This print listing includes all forecast records within your selection criteria.

Posting Forecasts

To post all records within your listing, press F6 . The system processes all unposted records that satisfy the current selection criteria in the Imported Forecast file, MPPIF; specifically, the system processes all newly received records and records from previous uploads that were not posted (probably due to errors).

The system performs all validation checks on the records. These are the same as the validations in the *Work with Forecast* option.

The system posts records that pass validation to the Advanced Planning Forecast file (MPPMF). The system assigns the status of Posted to the source record in the Imported Forecast file (MPPIF). This excludes this record from future postings. Or, you can set your Infinium MP Control files to automatically delete posted records from MPPIF. To do this, refer to the “Completing Preliminary Setup” topic in this appendix.

If a record already exists in the Production Forecast file, MPPMF, with identical key values as the record from MPPIF, the system overwrites it in MPPMF. If a record does not exist in MPPMF with the same key, the system adds it to MPPMF.

If a record does not pass the validations, the system marks it as Error and the error fields identify the type of error.

Whenever you post records, the system automatically generates the Imported Forecast Post Exceptions report. Also, depending on your Infinium MP Control file setup, the system may automatically print the Imported Forecast Post and Purge report or the Imported Forecast Post report. Samples of these reports are in the "Infinium MP Reports" appendix.

After you press F6 on the Forecast Header List screen, the system displays the Confirm Post screen.

Press F6 to confirm the post. To display information on the forecasts prior to posting, type either **5** or **9** beside the forecast and press Enter.

Purging Forecasts

The system assumes that all records associated with your selection criteria are the records you want to purge.

```
 6/19/97     14:14:07     Work with Imported Forecast      MPGIFM     MPDIFM
                                  Confirm Purge
A job will be submitted to delete all selected records.
Make sure no other Forecast Import related option will
run during this purge process.
Press Purge key to submit the job.
  Status . . . . . . . . . . . . . :   4     ALL
  Transaction Id . . . . . . . . . :
  User . . . . . . . . . . . . . . :
  Date . . . . . . . . . . . . . . :
5=Display Details  9=Display UDF
Opt       Co Whse  Product                Size Type  Forecast Description Status
 _      VMS 10    ABATTER                  GL  MAX                        ERROR
 _      VMS 10    BBATTER                  GL  MAX                        ERROR
 _      VMS 10    CAKEMIX                  LB  DFALT                      ERROR
 _      VMS 10    CM-BATTER                GL  DFALT DEFAULT FORECAST TYP ERROR
 _      VMS 10    FLOURMIX                 LB  MAX                        ERROR
 _      VMS 10    SUNDAE6                  LB  MAX   MAX SALES            RDY TO POS
 _      VMS 10    SUNDAE8                  LB  SALES FOR ORDER PROCESSING RDY TO POS
                                                                            More...

F2=Function keys  F3=Exit  F10=QuikAccess  F12=Cancel  F24=More keys

   24-3         SA       MW       KS  CL  IM  DM  II       WHQ421     KB   SNA01S3
```

Figure D-17: Confirm Purge screen

To purge forecasts, press F22. To display information on the forecasts prior to purging, type either **5** or **9** beside the forecast and press Enter.

Make sure no other user is performing any *Forecast Import* option when you execute this option. *Forecast Import* options include: *Import Forecasts*, *Work with Imported Forecast*, *Post Imported Forecast*, and *Purge Imported Forecast File*.

Posting Forecast Records

Use the *Post Imported Forecast* option to post all unposted records from the Imported Forecast file, MPPIF, to the Infinium MP Forecast database file, MPPMF.

Use the menu path below.

- *Forecast Import*
  - *Post Imported Forecast* [PIF]

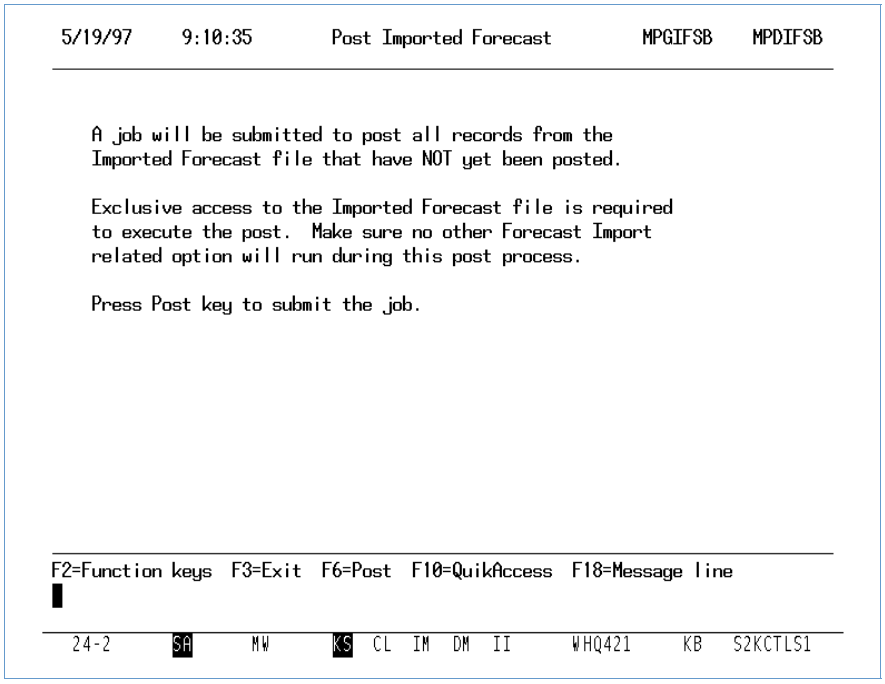


Figure D-18: Post Imported Forecast screen

Press F6 to post all unposted records in the Imported Forecast file, MPPIF. The system performs all validations as executed in the *Work with Imported Forecast* option. If a record from MPPIF fails one or more validations, the system identifies it as erroneous. The system also distinguishes this in the Posting Exception report.

If a record already exists in the Production Forecast file, MPPMF, with identical key values as the record from MPPIF, the system overwrites it in MPPMF. If a record does not exist in MPPMF with the same key, the system adds it to MPPMF.

Make sure no other user is performing any *Forecast Import* option when you execute this option. *Forecast Import* options include: *Import Forecasts, Work with Imported Forecast, Post Imported Forecast,* and *Purge Imported Forecast File*.

Whenever you post, the system automatically generates the Imported Forecast Post Exceptions report.

If you type **0** in the *Delete of Posted Forecasts* field and **Y** in the *List Purged Forecast* field in the Infinium MP Control files, the system automatically generates the Imported Forecast Post and Purge report for you whenever you post forecasts.

If you type **1** in the *Delete of Posted Forecast* field and **Y** in the *List Posted Forecast* field, the system automatically generates the Imported Forecast Post report whenever you post forecasts.

You can also post forecast records via the *Work with Imported Forecast* option.

Press F3 to cancel.

```
MPGIFS     MPTIFL                                         I M P O R T E D   F O R E C A S T   P O S T                                  PAGE    2
 7/22/00    9:29:58                                                                                                                          PG
-----------------------------------------------------------------------------------------------------------------------------------------------
                               FCST                                FORECAST                                                              TRANSACTION
   CO  WHSE    PRODUCT   SIZE  TYPE   FORECAST DESCRIPTION  DATE        QUANTITY   UM    STATUS  ORIGIN  USER ID TRANS ID     DATE
  INF  INF     PROD11           FUTUR  REGION2'S FRCST TYPE  11/00/2000  50.0000   LB    NEW              PG      038683      07/11/2000
                                                            12/00/2000  50.0000   LB    NEW              PG      038683      07/11/2000
                            ***** RECORDS SELECTED  . :  00130
                            ***** RECORDS POSTED  . . :  00047
                                                                                  ********** END OF REPORT **********
```

```
MPGIFS     MPTIFSE                     I M P O R T E D   F O R E C A S T   P O S T                                     PAGE    5
 7/22/00    9:29:58                                 EXCEPTIONS REPORT                                                  PG
-------------------------------------------------------------------------------------------------------------------------------------
                                         FCST   FORECAST
    CO  WHSE   PRODUCT              SIZE  TYPE   DATE             QUANTITY   UM
 INF01                                    TFR    03/00/2000                   EACH
                                                   ERROR IN WAREHOUSE CODE
                                                   ERROR IN PRODUCT-SIZE CODE
                                                   ERROR IN UNIT OF MEASURE
 INF01                                    TFR    04/00/2000                   EACH
                                                   ERROR IN WAREHOUSE CODE
                                                   ERROR IN PRODUCT-SIZE CODE
                                                   ERROR IN UNIT OF MEASURE
 INF01                                    TFR    04/00/2000                   EACH
                                                   ERROR IN WAREHOUSE CODE
                                                   ERROR IN PRODUCT-SIZE CODE
                                                   ERROR IN UNIT OF MEASURE
 INF01                                    TFR    05/00/2000                   EACH
                                                   ERROR IN WAREHOUSE CODE
                                                   ERROR IN PRODUCT-SIZE CODE
                                                   ERROR IN UNIT OF MEASURE
 INF01                                    TFR    05/00/2000                   EACH
                                                   ERROR IN WAREHOUSE CODE
                                                   ERROR IN PRODUCT-SIZE CODE
                                                   ERROR IN UNIT OF MEASURE
 INF01                                    TFR    06/00/2000                   EACH
                                                   ERROR IN WAREHOUSE CODE
                                                   ERROR IN PRODUCT-SIZE CODE
                                                   ERROR IN UNIT OF MEASURE
 INF01                                    TFR    06/00/2000                   EACH
                                                   ERROR IN WAREHOUSE CODE
                                                   ERROR IN PRODUCT-SIZE CODE
                                                   ERROR IN UNIT OF MEASURE
 INF01                                    TFR    07/00/2000                   EACH
                                                   ERROR IN WAREHOUSE CODE
                                                   ERROR IN PRODUCT-SIZE CODE
                                                   ERROR IN UNIT OF MEASURE
 INF01                                    TFR    07/00/2000                   EACH
                                                   ERROR IN WAREHOUSE CODE
                                                   ERROR IN PRODUCT-SIZE CODE
                                                   ERROR IN UNIT OF MEASURE
 INF01                                    TFR    08/00/2000                   EACH
                                                   ERROR IN WAREHOUSE CODE
                                                   ERROR IN PRODUCT-SIZE CODE
                                                   ERROR IN UNIT OF MEASURE
                           ***** RECORDS PROCESSED . :  00130
                           ***** RECORDS IN ERROR  . :  00083
                                                ********** END OF REPORT **********
```

```
MPGIFS     MPTIFL                    I M P O R T E D   F O R E C A S T   P O S T   A N D   P U R G E                      PAGE    2
 7/22/00   10:01:12                                                                                                          PG
-----------------------------------------------------------------------------------------------------------------------------------------
                                         FCST                                  FORECAST                                                                                 TRANSACTION
   CO  WHSE   PRODUCT              SIZE  TYPE   FORECAST DESCRIPTION           DATE             QUANTITY  UM    STATUS       ORIGIN      USER ID     TRANS ID    DATE
  INF  INF    PROD11                     FUTUR  REGION 2'S FCST TYPE           11/00/2000        50.0000  LB    NEW                      PG          038683      07/11/2000
                                                                               12/00/2000        50.0000  LB    NEW                      PG          038683      07/11/2000
                            ***** RECORDS SELECTED  . :  00130
                            ***** RECORDS POSTED  . . :  00047
                                                                                 ********** END OF REPORT **********
```

Purging Forecast Records

Use the *Purge Imported Forecast File* option to purge only posted forecasts.

Purge forecasts of any status using the *Work with Imported Forecast* option.

Use the menu path below.

- *Forecast Import*
  - *Purge Imported Forecast File* [PIFF]

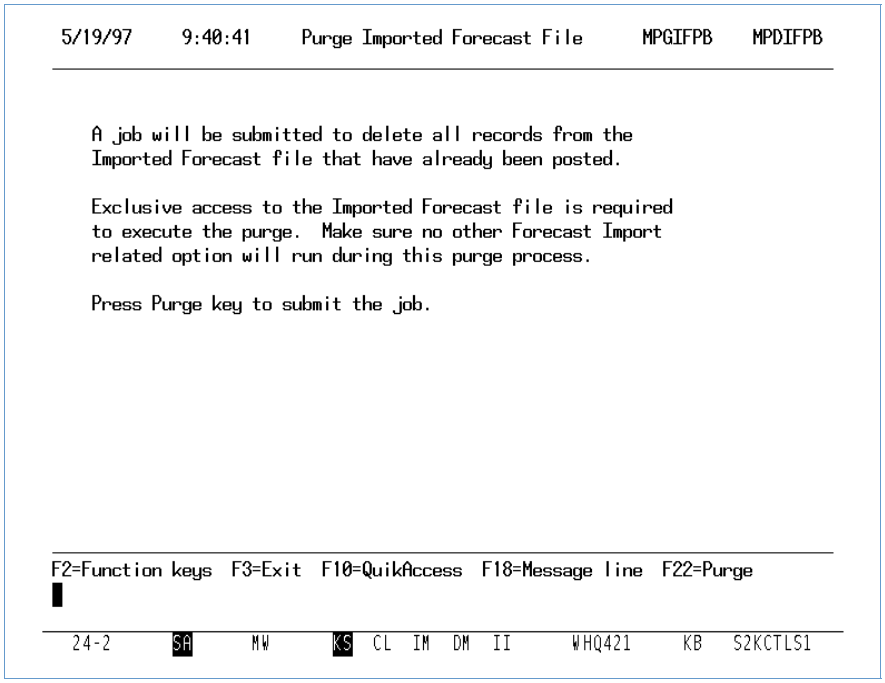


Figure D-19: Purge Imported Forecast File screen

Make sure no other user is performing any *Forecast Import* option when you execute this option. *Forecast Import* options include: *Import Forecasts, Work with Imported Forecast, Post Imported Forecast,* and *Purge Imported Forecast File*.

Press F22 to execute the purge and F3 to cancel and exit.

When you run this option, the system automatically generates the Imported Forecast Purge report if you have the *List Purged Forecast* field set to **Y** in the Infinium MP Control file. A sample of this report follows and is in the "Infinium MP Reports" appendix.

MPGIFP MPTIFL I M P O R T E D F O R E C A S T P U R G E PAGE 4
7/22/00 10:11:26 PG

CO	WHSE	PRODUCT	SIZE	FCST TYPE	FORECAST DESCRIPTION	FORECAST DATE	QUANTITY	UM	STATUS	ORIGIN	USER ID	TRANS ID	TRANSACTION DATE
INF01	INF01	PG-PRODUCT-1	EA	TFR	TEST MPS WITH TRANSFERS	01-01-2000	21059.0000	EACH	POSTED	--FTP	PG	028506	
INF01	INF02	PG-PRODUCT-1	EA	PROMO	PROMOTIONAL SALE	06-01-2000	700.0000	KG	POSTED	VIA MP TRF	PG	028332	
						07-01-2000	650.0000	KG	POSTED	VIA MP TRF	PG	028332	
						08-01-2000	600.0000	KG	POSTED	VIA MP TRF	PG	028332	
						09-01-2000	550.0000	KG	POSTED	VIA MP TRF	PG	028332	
						10-01-2000	500.0000	KG	POSTED	VIA MP TRF	PG	028332	

***** RECORDS DELETED . . : 00147

********** END OF REPORT **********

Understanding Imported Forecast Reports

The following table identifies the available Infinium MP Forecast Import related reports and when the system generates them. All reports are in the "Infinium MP Reports" appendix.

Report Name	How Generated
Imported Forecast Listing report	The system automatically generates this report when you run the *Import Forecast* option. This lists the successfully imported records. You can also generate this report by pressing F8 on the Work with Imported Forecasts screen.
Import Forecast Exceptions report	The system automatically generates this report when you run the *Import Forecast* option. This report's title will depend on your data source. It will either be the Import Forecast Exceptions report (data source is the Infinium MP Transfer file) or Import Forecast via Common Services Exceptions report.
Imported Forecast Post Exceptions report	Whenever you post forecasts, the system automatically generates this report.
Imported Forecast Post report	If you type **1** in the *Delete of Posted Forecast* field and **Y** in the *List Posted Forecast* field on the Infinium MP Control files, the system automatically generates the Imported Forecast Post report whenever you post forecasts.
Imported Forecast Purge report	Whenever you run the Purge Imported Forecast option, the system automatically generates this report if you type **Y** in the *List Purged Forecast* field in the Infinium Control files.
Imported Forecast Post and Purge report	If you type **0** in the *Delete of Posted Forecasts* field and **Y** in the *List Purged Forecast* field, the system automatically generates the Imported Forecast Post and Purge report whenever you post forecasts.

Notes

Appendix E Calculations

E

This appendix contains the calculations the system uses to determine quantities for Master Production Schedules and Material Requirement Plans.

Status	Calculation Definition
Forecast	The system determines this quantity by the manual forecast you establish in the *Work with Manual Forecasts* option on the *Control Files* menu. You categorize forecasts by forecast type and you can select forecast types to include for an MPS through the *Work with Order Type Defaults* option. You can override the order types you select as defaults for individual MPS plans.
Orders	The system calculates this quantity based on open customer orders in Infinium OP. In the *Work with Order Type Defaults* option you specify which order types to include in an MPS. You can override the order types you select as defaults for individual MPS plans.
Receipts	The system calculates the receipts quantity based on existing batches that produce this product. Batches that the system includes in this quantity are those with a status of scheduled or work in process (WIP). This calculation also includes Infinium PM purchase requisitions in the **01**, open status, and Infinium PM purchase orders in the **01**, open status. Infinium PM transfer requisitions are not included in this calculation. In the *Work with Order Type Defaults* option you specify which order types for manufacturing batches, purchase requisitions, and purchase orders the system should include in an MPS or MRP. You can override the order types you select as defaults for individual plans.

Status	Calculation Definition
Usage	This quantity refers to batch usage based on batches in which this item is an ingredient. Batches that the system includes in this quantity are those with a status of scheduled, work in process (WIP), or firm planned. In the *Work with Order Type Defaults* option you specify which order types for manufacturing to include in the MPS. You can override the order types you select as defaults for individual MPS plans.
Firm Planned	The system calculates this quantity based on the production fill for firm planned batches currently on file. In the *Work with Order Type Defaults* option you specify which order types for manufacturing to include in the MPS. You can override the order types you select as defaults for individual MPS plans.
Available	The system calculates this value as follows: *Previous Period Available + Suggested MPS + Firm Planned Orders + Scheduled Receipts - Demand* The system calculates the demand value based on the consumption rule established in the Infinium MP *Control Files* menu.
Plan ATP	The system calculates this value as follows: *Suggested MPS + Firm Planned Orders + Scheduled Receipts - Customer Orders* The customer orders component of the equation includes those orders for the current period and all subsequent periods up to the next period with a suggested MPS, firm planned order, or scheduled receipt.

Status	Calculation Definition
Suggested	When available inventory falls below zero or the minimum quantity established in the Item Warehouse (you define this decision in the Infinium MP *Control Files* menu), the system suggests a quantity based on the lot size technique assigned to the item. Lot for Lot: The suggested quantity is the net requirements for each period. Fixed Order Quantity: The suggested quantity is the fixed order quantity in the Item Warehouse file. Lot for Lot with Min/Max: The suggested quantity is the order policy/lot size quantity if the net requirements are less than the order policy/lot size quantity you establish in the Item Warehouse file; or the maximum reorder quantity if the net requirements are greater than the maximum reorder quantity specified in the Item Warehouse file. If the quantity falls between the order policy/lot size quantity and the maximum reorder quantity, the system suggests the net requirement. Chase: The suggested quantity is the forecast quantity for the time period. Leveling: The suggested quantity is the average of all time period requirements in the plan.
Independent Demand	The system calculates this value as follows: Customer Orders + Batch Usage Independent demand values for each bucket include customer orders and usage from the start date of the period in which the value displays, up to the start date of the next period. This is only for batches with a scheduled or work in process status. In the *Work with Order Type Defaults* option you specify which order types for manufacturing to include in the MPS/MRP. You can override the order types you select as defaults for individual MPS/MRP plans.

Status	Calculation Definition
Dependent Demand	The system determines this value by the requirements from the MPS or a parent item. The planning horizons determine which MPS quantities the system will use for dependent demand: • For requirements up to and including the present cutoff period, the system uses firm planned orders from the MPS. • For requirements after the present cutoff period up to and including the future cutoff period, the system uses firm planned orders and the suggested MPS. The system calculates requirements from parent items based on the planned order release quantity for the parent item. The system uses that quantity and determines the quantity (dependent demand) for each ingredient by referencing the individual ingredient quantities specified in the formula used to produce the product.
Receipts	This quantity is the sum of products filled in manufacturing and purchasing. Purchasing includes open, **01**, purchase orders, and open, **01**, purchase requisitions from Infinium PM. The planned production date for the batch or the need date for the purchase order determines the bucket where quantities display. Infinium PM transfer requisitions are not included in this calculation. In the *Work with Order Type Defaults* option you specify which order types for manufacturing batches and purchase orders the system should include in an MPS or MRP. You can override the order types you select as defaults for individual plans.
Projected Available	The system calculates this value as follows: *Previous Period Available - Independent Demand -Dependent Demand + Receipts + Planned Order Receipts*
Projected On hand	The system calculates this quantity using the following equation: *Previous Period On hand - Independent Demand - Dependent Demand + Receipts*
Planned Order Receipt	This value is the quantity that must be available at the beginning of a period. When available inventory falls below zero or the minimum quantity you established in the Item Warehouse file, the system calculates planned order receipts based on the lot size technique assigned to the item. A parameter in the Infinium MP *Control Files* menu allows you to select how the system calculates this value. Use the *Plan when available less than* field on the MRP Information screen to select zero or minimum as the level at which an order should be placed.

Status	Calculation Definition
Planned Order Release	The system calculates this quantity based on the planned order receipt quantity. To calculate this for each time period, the system uses lead times you established for individual items to determine when an item should be ordered or when a batch should begin production in order for the item to be available by the due date. Enter lead times in the Item Warehouse file for individual items. In the *Work with Lead Time Control* option on the Infinium CA *Code Files* menu, you specify which of those lead times the system should use in calculating lead times for MRP processing.

Notes